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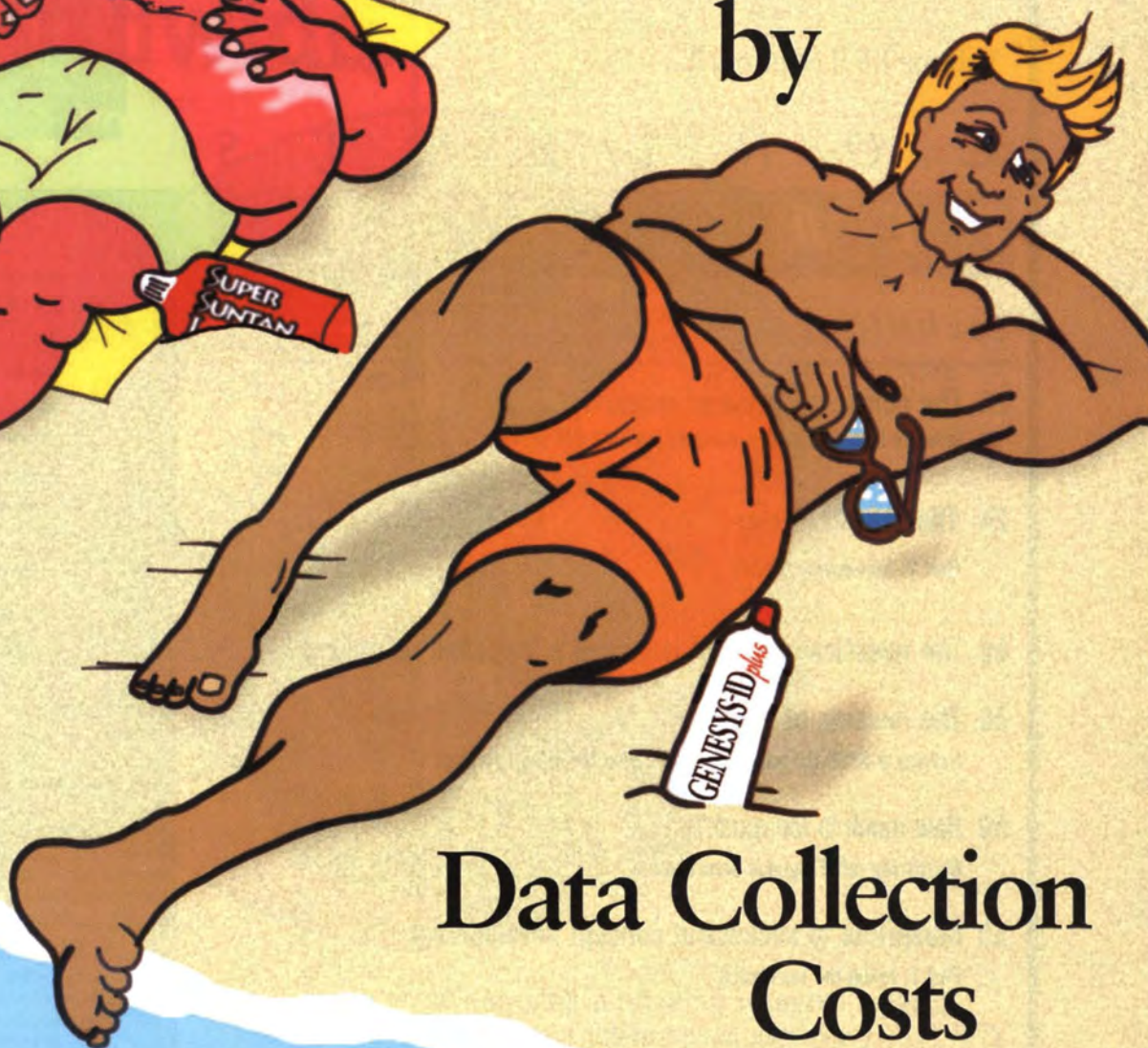
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Marketing Research Review

Volume XVII Number 2

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Illustration by Jennifer Coppersmith

Publisher Emeritus
Tom Quirk

Associate Publisher
Evan Tweed

Editor
Joseph Rydholm

Production Manager
James Quirk

Directory Manager
Steve Quirk

Directory Assistant
Shawn Hardie

Marketing Manager
Dan Quirk

Advertising Sales

Evan Tweed
952-854-5101

Lane E. Weiss
415-461-1404

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New products: a look back and a look forward

2002 saw a host of innovative introductions

Corporate America would just as soon forget about 2002, but packaged goods marketers made the year a memorable one on the new product front. Collectively, these companies managed to introduce 31,785 new food, beverage, health and beauty aids, household and pet products during 2002, according to the Productscan Online database of new products (www.productscan.com) from Naples, N.Y.-based Marketing Intelligence Service.

2002's new product total was just 0.7 percent shy of 2001's record new product count. Even better, though, was the news on the innovation front. Packaged goods companies may have launched fewer new products in 2002, but they also introduced more products that were genuinely new and different. Of 2002's new product introductions, 8.8 percent earned an Innovation Rating, the highest Innovation Rating since 1989, when 13.4 percent of product launches were deemed to be innovative. Productscan Online's Innovation Ratings tally the number of new products that offer breakthrough features or benefits in any one of the following six areas: formulation, positioning, packaging, technology, creating a new market, and merchandising.

Busy consumers want products that will save them time and effort, a common theme for 2002's "Build a Better Mousetrap" winners. Some of the year's top new product innovations also feature technological breakthroughs that should save consumers time and money in coming years. The 10 new products below were chosen as the year's top innovations from U.S. and Canadian introductions reported in 2002 by Productscan Online.

You like wheat bread, your kids like white bread. Buy a loaf of each and mold will get half of each loaf before either of you will. Enter Toronto, Ontario, Canada-based Weston Bakeries with its Country Harvest The Better Half Bread. This sliced bread is actually two loaves in one. One half of

New Product Introductions: 1992-2002

1992	15,886
1993	17,363
1994	21,986
1995	20,808
1996	24,496
1997	25,261
1998	25,181
1999	25,928
2000	31,432
2001	32,025
2002	31,785

Source: Productscan Online

the loaf is Harvest White bread, the other is Stone Milled Whole Wheat bread. The bread bag opens at both ends (a resealable zipper at one end and a plastic clip at the other) so consumers can easily retrieve the desired slices.

In many households, a hot breakfast is something that is only enjoyed on weekends when there's no rush to get to work or school. That doesn't have to be the case thanks to Vernon, Calif.-based Uncle Ben's, Inc.'s new Uncle Ben's Frozen Breakfast Bowls. These portable, disposable plastic bowls contain traditional breakfast favorites like bacon, egg and potatoes as well as more adventurous fare like peach and pecan pancakes.

Cuts and scrapes can occur anywhere. And when kids are involved, as many as three of every four injuries take place outside. So how come most first aid supplies are stuck in the bathroom cabinet, far away from where they are actually needed? That doesn't have to be, thanks to Greenwich,

Conn.-based Chesebrough-Pond's USA's new Q-Tips Treat & Go Swabs. Treated with Bacitracin ointment, the cotton swabs each come in plastic packets that easily fit into a purse or backpack.

Infertility tends to be viewed as a female problem, but it's really a two-way street. Until now, though, there was no quick and easy way to test for male infertility at home. Now there is with the Baby Start FertiMARQ Infertility Test for Men. New from Lake Consumer Products of Vernon Hills, Ill., it's the first and only at-home screening test for male infertility. Priced at \$39.99, it's low-cost compared to hospital or office testing.

Every parent has run into this before: the child with a hacking cough who refuses to take cough medicine because it doesn't taste good. Now there's a better way to get that child to take cough medicine with new Benlyn DM Medicated Dry Cough Freezer Pops for Children. A medicated freezer pop with an active ingredient of dextromethorphan, the Icy Orange and Glacier Grape flavored pops not only relieve dry coughs, but cool and soothe the throat too.

Cleaning the toilet routinely ranks as one of the least favorite household cleaning jobs. Anything that makes the job easier should be welcomed, which is good news for Flushable Toilet Wipes by Scrubbing Bubbles from Racine, Wis.-based S.C. Johnson & Son. Use them to wipe up stains from the toilet seat, rim, tank or other outside toilet surfaces. When done, simply toss the biodegradable cloth wipes in the toilet.

What would you call a product that is big enough for a family of four to sit on yet small enough to fit into a beach bag? Neenah, Wis.-based Kimberly-Clark calls it The Neat Sheet Ground

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Names of Note

Thomas J. Dutt has joined Chicago-based *Peryam & Kroll Research Corporation* as vice president, consumer insights.

Brian Darr will manage the new Chicago office of Los Angeles-based *Datassential Research*.

Tim O'Rourke has been appointed director of multivariate services at New York-based research firm *Ziment*. **Kara Olds** has also joined *Ziment* as senior manager of client service.

Michele Wojtyna has been named a senior vice president at New York-based *Data Development Corporation*. She will head the firm's new Chicago office.

Indianapolis-based *Walker Information* has promoted **Julie**

Easton to senior director of graphics and reporting.

Q Scores, Manhasset, N.Y., has promoted **Francine Purcell** to vice pres-



Purcell

ident, *Q Score Services*.

At *Millward Brown Ireland*, **Sonya McGuirl** and **Sinead Mooney** have been promoted to account director; **Margaret Hctor** has been promoted to CATI director. **Chia-Huei**

Parker has joined Thailand-based *Millward Brown Firefly* as qualitative director. She will be based in Hong Kong with responsibility extending to Taiwan.

Greenfield Online, Wilton, Conn., has named **David Reiss** managing director, Healthcare Group.

New York-based *Jupitermedia Corporation* has named **John R. Patrick** to its board of directors. Patrick retired from IBM in 2001; his most recent position was vice president of Internet technology.

IMS Health has named **Paul Saatsoglou** practice area leader for global resource optimization and **Pankaj Kumar** practice area leader for advanced research and segmentation.

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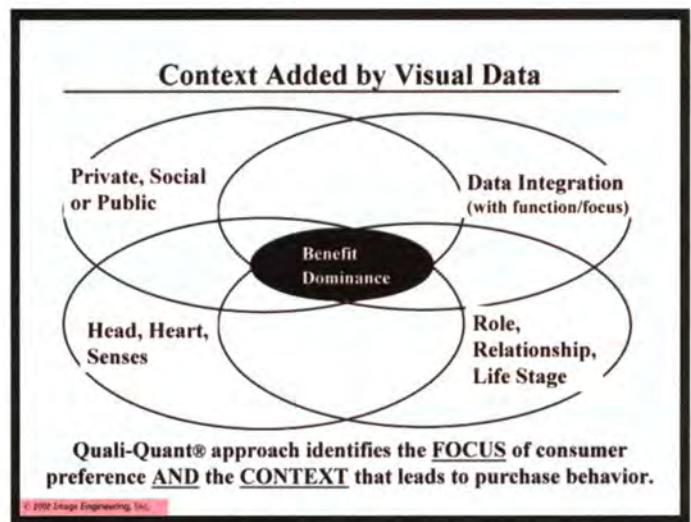
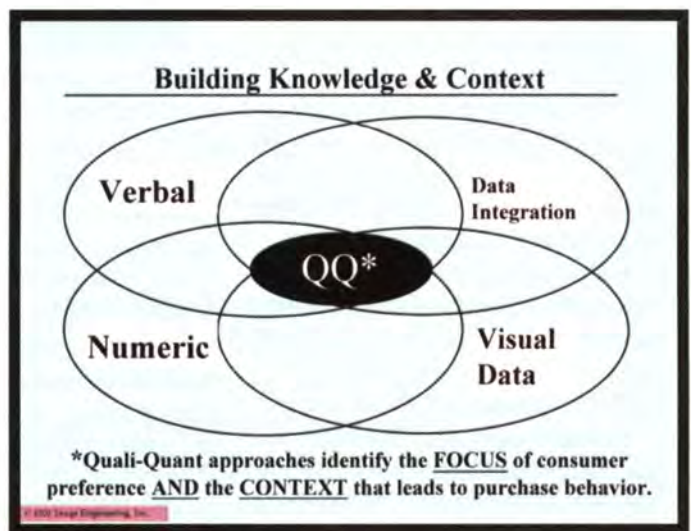


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Pulse Train updates

Pulsar

U.K.-based Pulse Train has released Pulsar WEB 2.50-00. Enhancements included within this version of the survey software are:

- Caching of data. Report results are now stored in the Pulsar WEB database once a report has been calculated. The results are then reloaded next time the report is opened so calculation time is avoided.

- Optimization of ASP. Table and chart generation is now faster.

- Global Filter panel. The global filter is now displayed, along with the project details, in the bottom left corner of the screen. Users can right-click over this area to change the filter.

- Domain refresh option. The refreshing of domains when creating new users can now be switched off. This can save time when creating new users on domains with many users.

- Statistic suppression. Statistics that are not applicable for a report are now suppressed. Previously "N/A" would be displayed.

- Load balancing. The calculation work can be shared between two or more machines to increase the performance.

- Support of the automatic transposition and weighting utility. This new utility allows users of Bellview FUSION and Bellview WEB to analyze large data sets more efficiently. Data accessed directly via the database is not stored in the best way for analysis. This is due to the fact that the data is stored on a respondent level, and because access through ODBC is not the fastest way to analyze large data sets.

The Pulsar WEB utility will periodically read the Bellview FUSION or Bellview WEB database and transpose the data into the optimal format for analysis by Pulsar WEB. Weighting can also be applied at this stage. The utility can be scheduled so that every x minutes the transposed data will be

updated. For more information visit www.pulsetrain.com.

Walker debuts loyalty research product

Indianapolis-based Walker Information has released its SmartLoyalty Solution Provider (SP) edition, a customer survey solution combining research science and technology applications. SmartLoyalty SP helps equip businesses with knowledge about which customers are going to leave, which are going to stay and what changes can impact that decision.

The primary offering of Walker Information's newly formed Mid-market Solutions Division, SmartLoyalty SP will offer a system targeted at the IT solution provider category, including system integrators, value added resellers, IT/business consultants, service providers, telephony integrators, and software vendors.

SmartLoyalty SP combines causal models with a Web-based, hosted software application. Customer feedback on items such as the competitive landscape and future intent to purchase is enhanced by the ability to segment customers into specific loyalty groupings for insights at the individual account level. Other features include: automated e-mail alerts to keep account managers up-to-date with customers' latest feedback and segmentation based on their attitudes and perceptions; and regularly scheduled e-mail reports to keep employees accountable for monitoring and addressing specific customer concerns. For more information visit www.walkerinfo.com/sp.

Stay on task with ProjectPads

Market Research Project Management, Inc., Kimberling City,

Mo., is now offering ProjectPads — a series of printed guidebooks designed to help corporate market researchers improve their companies' returns on investments made in custom market research.

ProjectPads are designed to help the market research project director maintain the integrity of the market research process when working with clients/sponsors, without frustrating their desires for responsiveness. In addition to the assistance they provide in organizing and monitoring market research project tasks, market research ProjectPads help establish the business ownership and commitment necessary for producing useful results.

The firm currently offers four ProjectPads: the Market Research Project LaunchPad; the Focus Group ProjectPad; the Phone Survey ProjectPad; and the Written Survey ProjectPad. The company also offers on-site seminars and one-on-one Internet tutorials designed to enhance market researchers' project management skills. For more information visit www.marketresearchprojectmanagement.com or call 417-739-1270.

GeoLytics releases Census packages

East Brunswick, N.J., software firm GeoLytics is now offering three new packages: Census 2000, Census Reference, and Census Research. Census 2000 package includes all of the CensusCD 2000 products (Long Form; Long Form Profile; Short Form; Short Form Blocks; Redistricting; Redistricting Blocks) in a package of 12 disks. The Census Reference package has all of the firm's CensusCD 2000 products and all of its Long Form products for the previous decades. This reference set provides all of the basic Census data

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News notes

Effective January 6th, the businesses which comprise the **Aegis Group plc** research network rebranded as **Synovate**. Among the companies renamed as Synovate are: Market Facts and its subsidiaries in the Americas; Asia Market Intelligence and Research Fact in Asia; Demoscopic, INNER Strategic Market Research, Market&More, MEMRB Custom Research Worldwide, Pegram Walters, and the Sample Surveys Research Group in Europe, the Middle East and Africa.

Chicago-based **Information Resources, Inc.** announced in December that it will eliminate about 5 percent of its workforce in the U.S. and Europe. These workforce reductions will occur through layoffs and the elimination of open positions. The

company will record a pre-tax charge of \$7.8 million or \$5.3 million net of tax, in its fiscal fourth quarter for severance and other costs related to the layoffs. Factoring in the impact of these charges on the fourth quarter and full year, IRI will not achieve previously announced 2002 earnings target.

"These actions will allow us to reduce costs associated with our Retail Tracking business in both the United States and Europe and to increase investment for various growth opportunities including expanded channel coverage, Panel and Analytics and the company's health care initiative," says Joe Durrett, Chairman and CEO. "Over the past three years IRI has worked hard to improve productivity and we are running our business today with significantly fewer people than we

were three years ago. Our ability to take further reductions reflects the process and efficiency improvements our organization continues to make and it should help 2003 and beyond."

IRI also announced that Procter & Gamble would not be renewing its U.S. market measurement business with the company. The current contract expires in July 2003. Concurrently, Procter & Gamble announced it would purchase U.S. market share data from **ACNielsen** effective July 1, 2003. Financial details were not disclosed.

Alliances/strategic partnerships

WebSurveyResearch and **Ipsos North America** will work together to deliver online surveys to assess marketing research information from physicians and other health care pro-



The European Society for Opinion and Marketing Research (ESOMAR) will hold Global Healthcare 3, its global health care marketing research conference and exhibition, on February 23-25 in New York. For more information visit www.esomar.nl.

The European Society for Opinion and Marketing Research (ESOMAR) will hold its fragrance research conference, themed "From Consumer Insights to Winning Fragrances," on March 16-18 in Lausanne, Switzerland. For more information visit www.esomar.nl.

Britain's Market Research Society will hold its annual conference on March 19-21 at the International Convention Centre in Birmingham, England. For more information visit www.mrs.org.uk.

The Southwest, Southern California, and Northern California/Pacific NW

chapters of the Marketing Research Association will hold their annual Las Vegas conference on March 19-21 at Treasure Island Hotel and Casino. For more information visit www.swmra.org.

The European Society for Opinion and Marketing Research (ESOMAR) will hold a conference titled "Excellence in Consumer Insights" on March 30-April 1 in Madrid. For more information visit www.esomar.nl.

The Advertising Research Foundation (ARF) will hold its annual convention on April 9-11 at the New York Hilton. For more information visit www.arfsite.org.

Sawtooth Software will hold its annual conference on the acquisition and analysis of market research data

on April 15-17 at the Hyatt Regency Hotel in San Antonio, Texas. For more information contact Marilyn Stanford at 360-681-2300 or visit www.sawtoothsoftware.com.

Canada's Professional Marketing Research Society (PMRS) will hold its annual conference on April 27-29 at the Empire Landmark Hotel and Conference Center in Vancouver. For more information visit www.pmr-aprm.com.

The Qualitative Research Consultants Association (QRCA) and the Association for Qualitative Research (AQR) will hold a joint conference on April 30-May 2 at the Sheraton Lisboa Hotel & Towers in Lisbon, Portugal. For more information visit www.qrca-aqr-conference.info.

professionals. Under the terms of the letter of intent, Ipsos will have immediate access to WebSurveyResearch's physician panel for performing marketing research. Ipsos North America will perform the questionnaire design and analysis of data.

Association/organization news

The Association for Qualitative Research (AQR) has announced Luigi Toiati as the first winner of the Prosper Riley-Smith Effectiveness Award. Toiati, chairman of Focus Research, received the award for his development of Tao collages, a new qualitative research technique based on Eastern philosophies. The Prosper Riley-Smith award was established by the AQR in 2002 in memory of its former chairman to encourage fresh thinking and stretch the boundaries of the qualitative profession.

Britain's Market Research Society (MRS) has issued new draft guidelines on the use of observational research. Aimed primarily at mar-

ket and social researchers, the guidelines are intended to provide practical information on all aspects of observational techniques with a particular focus on the legal and ethical frameworks.

The new guidelines cover a range of topics, including the increasing use of video technology to collect observation data and the ethical issues relating to ethnographic research. The guidelines expand on the requirements of Britain's Data Protection Act 1998 and the legal parameters of the Office of the Information Commissioners CCTV Code of Practice, as well as reinforcing the key principles of the MRS' Code of Practice.

"For many years, observation techniques have been used as a key data source, especially in qualitative studies," says Jon Chandler, managing director, Context Research. "Recently, advances in video technology have created new opportunities for observational research. However, alongside these develop-

ments, the legal and ethical frameworks which govern observational research have become more complex." Copies of the new guidelines are available at www.mrs.org.uk.

Separately, the MRS has formed the Ethnic Researchers Network, the aim of which is to broaden the understanding of ethnic research in the U.K. and promote expertise in this field. The group has some 30 members who will meet regularly to share information, promote best practices and tackle current issues faced by those conducting ethnic research. This information will be disseminated to the wider market research community via the MRS Web site. The group will be chaired by Anjul Sharma, associate director at TRBI, with Karen Roberts from Connect Research and Mintel's Elvira Doghem-Rashid acting as vice chairs.

The European Society for Opinion and Marketing Research (ESOMAR) has elected the members

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Qualitatively Speaking

The focus group – popular but dangerous

By Jim Nelems

Editor's note: Jim Nelems is founder and CEO of The Marketing Workshop, Inc., an Atlanta research firm. This article excerpted from his book Research to Riches: The Secret Rules of Successful Marketing, published by Long Street Press. He can be reached at jnelems@mwshop.com.

No one is sure when the first focus group was conducted. After all, the term focus group is simply another name for a discussion session, typically with eight to 12 people, in which the topic is “focused” in given areas, but it may be the single most popular marketing research technique. There are over 1,000 focus group facilities in the U.S., and over 200,000 such focus groups are conducted annually. Just about everybody does focus groups. (That’s one of the problems, of course: they are too easy to do.)

Focus groups are often used for several reasons, some of which are invalid ones. True, focus groups are fast (they can be set up in a few days to a week), inexpensive compared to quantitative research, and can provide some basic and sometimes in-depth learning within the “fast and inexpensive” (some would say “quick and dirty”) context.

To elaborate, focus groups can be helpful if properly used, and there are many valid reasons for conducting them:

- to learn consumer language and terminology;
- to test assumptions or hypotheses regarding reactions to proposed new products and services;
- to demonstrate to clients not familiar with the technique how little consumers may know or care about the new concept.

But even then focus groups have limitations and can be abused. They are directional, not projectable; indicative not quantitative. And you don’t make groups projectable by doing more focus groups, although some practitioners believe that.

Pity the poor moderator whose client wanted to do 16 focus groups — two in each of eight cities, because their competition was different in each city. Any moderator in this situation will soon find herself (most moderators are female, which is an interesting topic in itself) asking the group participants in the third or fourth city: “Pardon me, but have I asked you this before?”

The truth is that while the competitive environment may well differ by

city, in virtually all product and service categories, the attitudes that drive decisions and how people think about products and brands do not. Further, differences of this type, if they do exist, are rightfully found in quantitative studies. After all, imagine how many telephone interviews could be conducted for the price of 16 focus groups.

Focus groups rely, sometimes too much, on what people verbalize in a group. When people start talking, either with strangers or friends, they never want to put themselves in a bad light or reflect unfavorably on themselves. So they often say things that sound good: “I’m not influenced by advertising” is a perfect example. Well, if that were true, there would never be any advertising. But we know advertising influences people, regardless of what they say.

Focus group moderators (a moderator is called a “facilitator” in all disciplines other than marketing research) must constantly be on guard to prevent a focus group participant who may have a dominating personality, or may quickly be seen to have more knowledge than the other participants, from leading the discussion.

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Data abuse

**An old curmudgeon
recounts some research atrocities**

By Gary M. Mullet

Editor's note: Gary M. Mullet is president of Gary Mullet Associates, a Lawrenceville, Ga., data analysis and consulting firm. He can be reached at gmmullet@mindspring.com.

As this is being written, best/worst lists are popping up — sometimes literally — in various media. Best movies, worst dressed, most expensive cities in which to live, and on and on. One advantage of the onset of my dotage (very rapid onset according to my children) is that it's becoming socially acceptable for me to be an old curmudgeon. With that in mind and tongue only sometimes in cheek, I've compiled a list of, for want of a better term, research atrocities (all disguised). The faithful readers of this column will recognize an occa-

sional reprise of a couple of my earlier favorites, but most will be new and, I hope, informative. And there may be some, mostly inadvertent, overlap between categories. And oh yeah, as Dave Barry is wont to write, "I'm not making this up."

Respondent abuse

Well, the wording may be a little strong, but there are several instances of making the respondent's task extremely difficult. Sure, we want every research project to answer every possible question posed by everyone involved. And in some big organizations there are lots and lots of folks, from lots of departments, involved. Without further ado, here are a couple of my favorites:

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Software Review

Bellview Web from Pulse Train

By Tim Macer

Editor's note: Tim Macer is a U.K.-based independent specialist and adviser in the use of technology for survey research. He can be reached at tim@macer.com. For more information visit www.macer.com.

The ability to do true multi-mode interviewing comes tantalizingly close with the latest version of Bellview Web from Pulse Train. The product, with a PC-based visual authoring tool, Web-based survey management and real-time reporting, offers a state-of-the-art end-to-end solution with a twist. Cleverly hidden beneath the surface is Pulse Train's proprietary QSL survey design language. QSL (or questionnaire specification language) also drives Bellview CATI, CAPI and Bellview Scan, the firm's muscular paper and scanning solution.

While others debate about whether it's better to design a questionnaire script using syntax or a GUI (graphical user interface), Pulse Train leaves the

choice to you in its point-and-click, Windows-based survey design tool. It actually offers you three modes within the single design tool for you to create your survey — and allows you shift effortlessly between them at will. Internally, surveys are defined in QSL, which you do not need to learn anymore to be able to set up surveys. If you do learn it (as would most Bellview CATI programmers, for instance), you simply need to open the syntax window and write your QSL code from scratch.

But you can avoid having to write any syntax because another view presents a cascading tree structure with pop-up windows in which every one of the hundreds of options in the language are represented. Unlike with many visual editors, this manufacturer does not sell you short on the functionality. Pulse Train has gone to enormous lengths to ensure that every language syntax command has an equivalent click-on option in the GUI editor, which is a fantastic achievement, considering the complex-

ity and the 15-plus-year history of QSL. It means your capabilities are not compromised if you decide to use the GUI rather than learn the syntax, and even if you do decide to learn QSL proper, it shortens the learning curve considerably by allowing you to create objects in the GUI then quickly sneak a look in the syntax window to see the equivalent language instructions you have just created.

The third, brand new view is one where questions are written in a kind of questionnaire preview mode, so they look like a printed questionnaire. This really does provide a quick start into using the product and allows you to set up the bare shell of a survey in a matter of minutes. It could work well for busy project directors who want to hand over a basic flow of questions and answers to more technical production people who are going to finesse the logic and any complex skips, rotations and the like. But there is an important drawback to using a generalized survey design tool for a Web survey: the previews it provides on screen do not in any way reflect what the screens will look like when the survey is presented on the Web. For an interviewing medium in which visual presentation is so important, there are

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Bellview Web from Pulse Train (www.pulsetrain.com)

Pros

- Sophisticated but easy-to-use end-to-end solution
- Excellent real-time stats and management
- Three-in-one design tool offering syntax, pop-ups or page mode
- Good for complex surveys

Cons

- Arms-length preview facilities
- Linking to images and multimedia objects not fail-safe
- No panel solution

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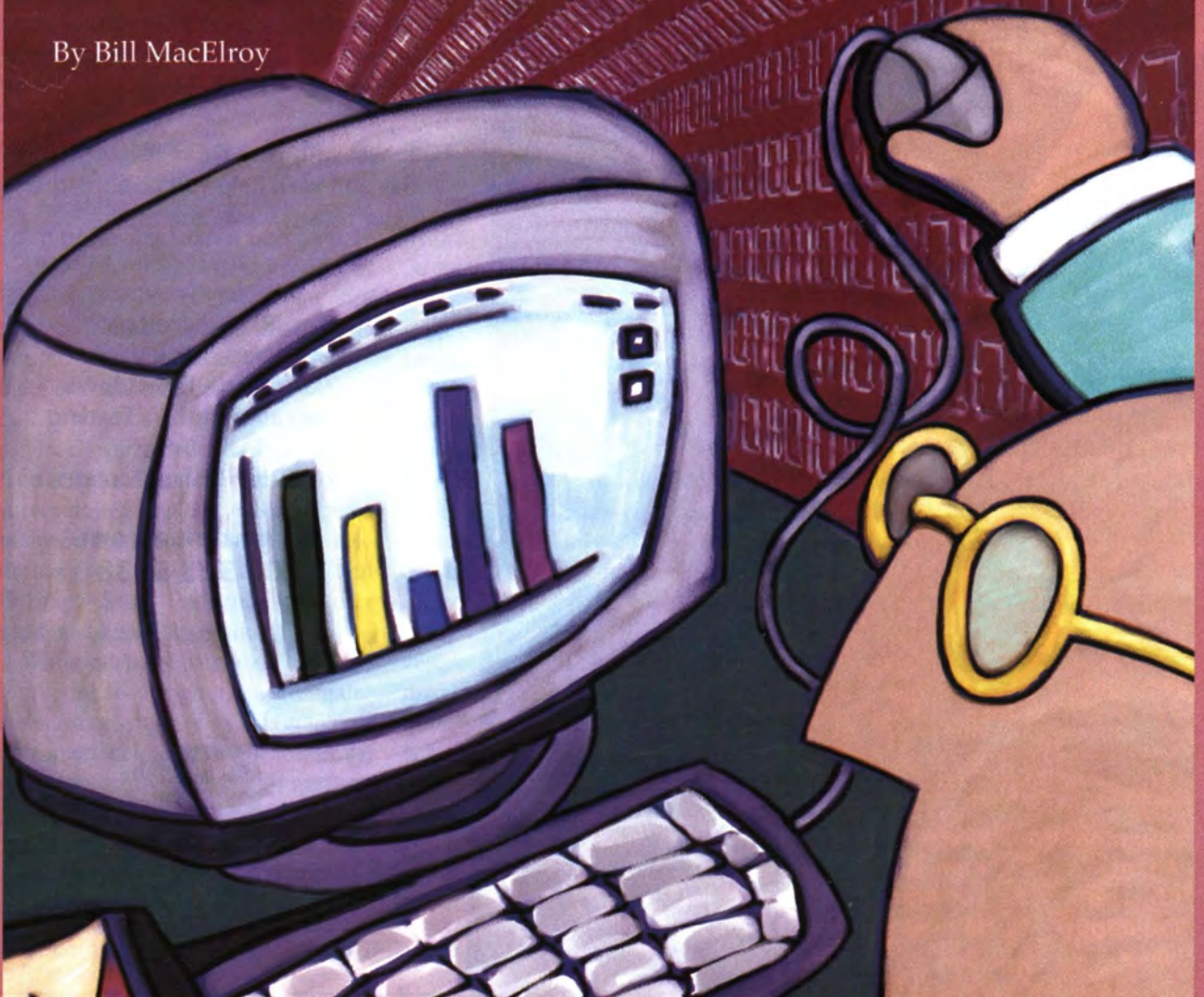
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The democratization of marketing research

By Bill MacElroy



Industry faces increasing competition from DIY surveys

Editor's note: Bill MacElroy is present of Socratic Technologies, Inc., a San Francisco research firm. He can be reached at bill.macelroy@sotech.com.

Historically, successful new technologies usually have been the result of many similar approaches competing to become the dominant technology. Many times, it is not the "best" technology that becomes the standard, but the one that can win the most hearts and minds in the battle of self-interest and economic gain. Thomas Kuhn (in *Structure of Scientific Revolutions*) called such intervals of experimentation and trial, "periods of foment." Foment, referring to the unrest and hyper-competition, not just between physical techniques but also between mindsets struggling to become the "dominant paradigm."

Several technological revolutions within recent memory have pitted "excellent technology with restrictive distribution" (e.g., Sony Betamax format, Apple operating systems) against "good technology with wide distribution," (e.g., VHS, IBM). In both cases, it can be argued that the technology that "won" the largest market share was not necessarily the best performer in all categories of the contest, but was the one that gave people the most easily available product at the lowest cost.

A similar period of foment is occurring today in the market

research industry, but the nature of the battle seems to be only slowly recognized by many corporate research professionals. This battle is also about low-cost, easily obtainable solutions for conducting marketing research versus high-cost, restrictive options. The two competitors are the corporate research departments and their end-clients: the product decision-makers, newly armed with do-it-yourself (DIY) research software.

For years, professional market researchers have attempted to find ways to expand the role of information gathering within the decision-making process of their firms. The value of research has been extolled in business schools and the marketing discipline since the 1960s. However, the process by which good and reasonable research is conducted, analyzed and disseminated as actionable information has been limited by two very important constraints: time and cost. These two factors have provided a perfect backdrop for a competitive research solution: software that claims to let anyone in the organization do his or her own research, for very little cost and, with the advent of the Internet, in very little time.

Competition in many forms

As internal research professionals look around the corporate landscape, they are beginning to encounter signs of the "competition" in many forms. Departments that are faced

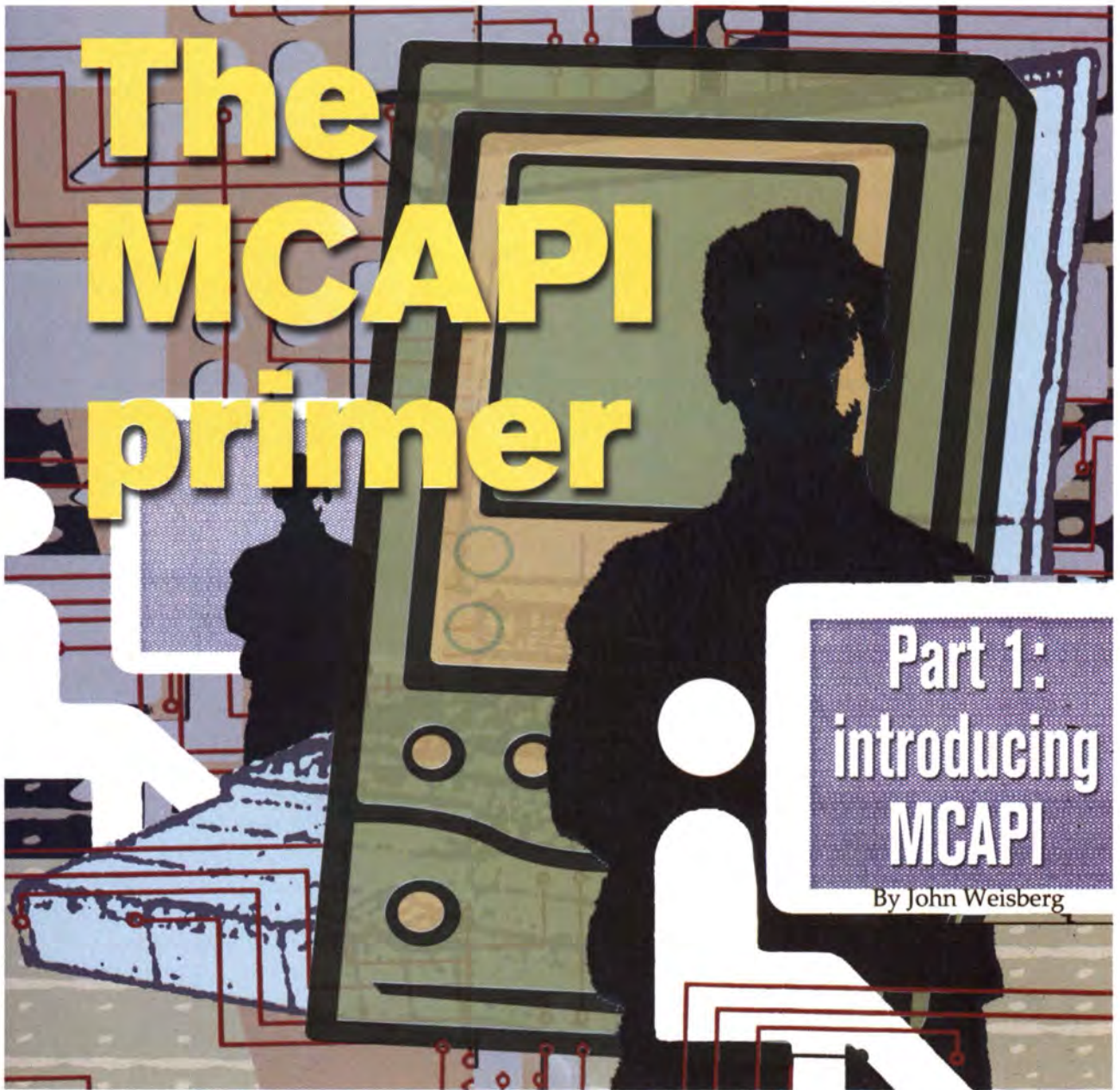
with pending decisions are beginning to avoid the traditional route of approaching the MR department, meeting to discuss objectives, waiting for objectives to be transformed into questionnaires, dealing with sample constraints and usually being faced with "large" cost estimates for which fewer-than-required budget dollars have been allocated. Instead, they have found the magic of simply doing it themselves using low-cost, off-the-shelf surveying tools.

Survey tools to perform online polling vary in price and quality, but all have the common allure of giving the individual decision maker the power to "get the job done," rather than wading through the long and more-expensive corporate research process. Many offer question templates that are presented as insurance against making common research mistakes. Some offer readily available sample sources that can, for a relatively small fee, produce willing respondents to take surveys of all types.

What these tools do not provide, unfortunately, is the education and experience to create good and unbiased questions. As the technology puts the ability to do research into everyone's hands, it is becoming clear that the aptitude for survey design, sampling strategy and analytical prowess are not as accessible as the survey apparatus.

Within the past three months, I

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The MCAPI primer

Part 1: introducing MCAPI

By John Weisberg

Editor's note: John Weisberg is vice president of marketing at Techneos Systems Inc., a Vancouver, B.C.-based research software firm. He can be reached at jweisberg@techneos.com. Part II will appear in an upcoming issue of Quirk's.

You're comfortable with the idea of telephone interviewing using CATI. You're still digesting the impact of Web-based interviewing. But now you're starting to hear about something called MCAPI. You might

be excited about a new interviewing technology that could provide further competitive advantage, or resigned to spending the time to learn about it.

You will find this primer valuable regardless of your reaction. It provides an introduction to MCAPI (mobile computer-assisted personal interviewing), explaining what MCAPI is, how it differs from other computer-assisted interviewing methods and paper-based interviewing, and when to use it. You'll discover that this interviewing method builds on what you already know and

do. It lets you refine existing procedures and focus techniques so that interviews can be conducted more effectively and efficiently, in hopes of reaping greater benefits and satisfaction for respondents, interviewers, and clients. Whether you are an end user or supplier of survey-based research, MCAPI will have an impact on your activities. So relax, and read on to see what's in it for you.

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(CAI) has become a well-accepted technology for survey research. There are a number of well-established CAI methods, including CATI (computer-assisted telephone interviewing), Internet-based systems, and CAPI (computer-assisted personal interviewing). As useful as these methods are, however, they cannot reach every population or necessarily reach them at the best time.

If respondents should be contacted at a certain time or place but CATI, Web interviewing, and CAPI are not suitable, what alternatives do researchers have? The choice has been to forgo the benefits of CAI and resort to paper questionnaires, or to contact respondents at a less optimal time or place so that one of the established CAI methods can be utilized. Neither choice provides an ideal data collection solution.

It is possible, however, to expand effective CAI coverage with mobile computing technologies. MCAPI's addition of mobility provides the benefits of CAI in many situations where pencil-and-paper interviewing was previously the only viable option. It allows researchers to improve current practices, and engage in new forms of research.

This definition of MCAPI is based on existing industry definitions of CAI (ESOMAR 2000):

MCAPI is mobile computer-assisted survey information collection in a face-to-face setting, where an interviewer enters respondent answers directly into a computer, and a specifically designed program manages the administration of the interview. The program controls presentation to the interviewer of the questionnaire elements, and may automatically record certain data, check for invalid responses, and perform calculations, thereby avoiding subsequent editing and keying in of data.

MCASI (mobile computer-assisted self-interviewing) is a variation for self-completion of a questionnaire by respondents. It differs from MCAPI primarily in terms of who enters the data. The survey software user interface varies accordingly. Interviewers can be given initial training to use a

more complex interface, in order to gain efficiency on every interview they conduct. For self-completed interviews, the software needs to be usable with minimal initial explanation and no support during the process of completing the questionnaire. Some MCAPI software programs allow enough control over the interface to be used in both situations. Throughout the rest of this primer, MCAPI is used to refer to all forms of mobile CAI.

An MCAPI system typically consists of these components:

- design software for a PC, used to create questionnaires and manage returned data;
- interviewing software for a mobile computer, used to administer questionnaires;
- communications software, to transfer data between the design and interviewing programs (it usually works behind the scenes);
- mobile computing hardware, most commonly a handheld computer.

MCAPI has been around since the late 1980s, so you might be wondering why, if it is useful, it isn't more common. One reason is that until the release of the Palm Pilot handheld computer in 1996, mobile computers weren't successful in the marketplace. Then the Internet tidal wave hit. Researcher buyers and suppliers, and most software developers, have been too busy coping with the impact of the Internet to consider mobile solutions. People are finding the time to look at other technologies, though, and the ability to access data anytime, anywhere by combining Internet and mobile technologies is driving most development work currently underway. MCAPI and mobile computing will inevitably become part of the researcher's toolkit over the next few years.

What makes it mobile?

"Mobile" indicates a critical distinction from CAPI. The low mobility of personal computers has restricted their use to certain locations. Face-to-face interviewing (i.e., CAPI) is often defined in terms of mall intercepts and door-to-door surveys.

Central location interviewing (e.g., a mall facility) requires that respondents naturally be at that location at some point in time. If not, participation in a survey requires additional time and effort on their part. On the other hand, hauling a laptop computer to the respondent's location is an added burden for the interviewer. Mobile computers make it much easier to go to where respondents are, wherever that may be, in order to collect data.

A mobile computer is one designed to be used while moving about. This means the research design no longer has to fit the places where other CAI methods can be used. Instead, a researcher can choose the data collection method and location that best meets criteria such as minimizing respondent burden, increasing response rate, limiting cost, and reducing overall error.

Experience and studies have shown that hardware with the following attributes is required to achieve the degree of mobility that makes MCAP

an effective alternative to other CAI methods:

- Low weight is essential when using a computer while moving about. It also eases transport or shipping to other project locations. Weight below one pound (450 grams) is preferable.

- Long battery life is required to be productive in the field. A minimum of eight hours run-time is recommended. Ideally, batteries should be user-replaceable, as most hardware problems in the field are caused by batteries. At a minimum, built-in batteries should recharge rapidly, and be rechargeable from additional power sources besides AC line current.

- Ergonomic design for mobile use. This includes size and shape, to make it easy to hold and use. It also covers interface design and input method, so that the interview can be easily navigated and data entered efficiently. A pen-based interface is superior to a keyboard when using the computer while standing or moving about. A keyboard can supplement pen input

for open-ended questions.

- Motion-proof hardware so that it will not be damaged when using the device on the move.

- Instant-on capability so the interview software can be accessed immediately without waiting for the computer to start up.

Desktop and laptop PCs do not have these attributes, and are unsuitable for mobile interviewing. Handheld computers are currently the most appropriate choice, but MCAP is not defined by the use of a handheld device. Other formats such as wearable computers are being developed. As different devices become more common and affordable in the future, they will provide new capabilities for mobile interviewing and observational studies. MCAP will continue to require compact devices that can be easily handed to a respondent.

Why use MCAP?

The primary reason to use MCAP is to effectively provide the benefits of CAI in more situations. It can replace



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paper directly, or supplant another CAI method that was used to replace paper when no better alternative was available.

There are four main advantages CAI methods such as MCAPI have compared to paper: speed, quality, economy, and power.

Speed means reducing the time it takes for each stage of a research project, as well as the total length. It is an advantage because research users need results faster than ever. Saving time also saves money, by improving productivity or making it possible to reach a decision sooner. It can also have a positive impact on quality — if initial interviews can be analyzed in hours instead of days or weeks, problems can be detected and resolved soon enough to improve subsequent interviews.

Quality means preventing errors, dealing effectively with errors that occur, and collecting more exact information. The benefits include more reliable results, reduced respondent and interviewer burden, and lowered costs.

Economy means providing at least as much speed, quality, and design power as paper, but at a lower cost. That can improve a firm's profitability, or allow more research to be completed with the same budget.

Design power means creating a questionnaire with built-in "intelligence" that optimizes its performance given the research objectives, respondent and interviewer characteristics, and interviewing situation. Paper questionnaires have no brains; the interviewer or respondent is entirely responsible for any operations that are required to complete the interview, such as skips, calculations, limiting the number of responses, etc. A good CAI program can automate such operations, and allow the designer to create a questionnaire that asks more precise questions without placing greater demands on the interviewer or respondent. The power of CAI also enables research approaches that simply are not possible with paper.

MCAPI in action: Example 1

The Liquor Control Board of

Ontario (LCBO) is the world's largest purchaser of beverage alcohol. Needing to assess customer response to its newest flagship store in Toronto, the LCBO faced a problem: how to apply its previously developed customer segmentation model in real-time during in-store interviews, so appropriate in-depth follow-up could immediately be conducted with members of each group.

MCAPI provided the solution. Automatic calculations evaluated responses to a set of attitudinal questions against established scores, and immediately indicated the group to which each respondent belonged.

Bob Collins, director of the LCBO's Customer Insights Group, feels the project would have been virtually impossible to do with PCs or laptop computers, and the calculations involved meant paper was out of the question. The questionnaire was much easier for interviewers to administer,

and power benefit research users and suppliers, interviewers, and respondents. While paper may still be the most commonly used method for collecting survey information, the advantages of CAI methods mean they are replacing paper whenever it is practical and cost-effective to do so. MCAPI offers the advantages of other CAI methods but also challenges the two qualities that have maintained the value of paper as a data collection technology: mobility and low initial cost.

Paper is superbly mobile. It can be mailed to individuals, shipped en masse, or carried in person to the required location. Its use for interviewing does not require any infrastructure: no phone lines, Internet connections, or electrical plug-ins required. Since it is such a widespread technology, there is minimal investment to use paper — researchers already have the equip-

Table 1: MCAPI Advantages vs. Paper

Activity	Speed	Quality	Economy	Power
Design — reuse questions and response sets. Create intelligent questionnaire with skips, calculations, response piping, randomization, automatic time stamp and respondent numbering, etc.	✓	✓	✓	✓
Layout — eliminated if software offers automatic screen layout	✓		✓	
Pre-testing — easier to make revisions and corrections. Software may provide automatic modification tracking, to create project documentation and simplify analysis	✓	✓	✓	✓
Questionnaire printing — eliminated	✓		✓	
Questionnaire shipping and on-site inventory management — eliminated. Questionnaires rapidly distributed and data returned electronically.	✓	✓	✓	
Interviewing — some errors eliminated, others can be identified during interview (e.g., range checks), allowing correct response to be obtained. Intelligent design makes interview faster (e.g., branching, filtering), and more relevant for a particular respondent.	✓	✓	✓	✓
Date entry setup — eliminated	✓	✓	✓	
Date entry — eliminated	✓	✓	✓	
Data cleaning — reduced by good design	✓	✓	✓	✓
Export — saves time if software offers direct export to analysis/reporting tools of both data and meta-data (e.g., value labels, formats)	✓	✓	✓	
Questionnaire storage and retrieval — electronic, so faster and less space required	✓	✓	✓	✓

so they were able to complete more interviews. Customers found the method more interesting than pencil-and-paper, resulting in a higher rate of cooperation. And unlike other survey formats, he says, there was no need to re-key the collected data.

Replacing paper

Greater speed, quality, economy,

and skills to work with paper questionnaires — and respondents are comfortable using it themselves.

Handheld computers have equally impressive mobility, with somewhat different characteristics. Their low cost means that although an up-front investment is required, it can be recouped relatively quickly by eliminating the incremental costs of

Table 2: MCAPI Costs vs. PAPI Costs

	Initial Investment	Incremental Project Costs	Incremental Interview Costs
Paper	No	+ Questionnaire layout * Interviewer training to use questionnaire (e.g., navigation, calculations, error checking, etc.) + Data entry setup + Data export setup	+ Questionnaire printing and shipping (initial and for any revisions) * Time to conduct complex interviews; error rates resulting in unusable interviews + Return shipping for questionnaires + Manual data entry * Data cleaning * Questionnaire storage
MCAPI	Yes	* Questionnaire design + Shipping handhelds (if required)	+ Batteries and handheld maintenance
	Key	+ only required for this method * higher than with other method	

using paper. MCAPI can't replace paper in all situations, but there are many times when it is a better choice.

Table 1 shows the advantages of MCAPI relative to paper questionnaires for various activities in a research project.

While MCAPI provides some time savings in the design stage (e.g., reuse of questions and response lists), it is normal to spend more time on

design than with paper. Additional work at this stage to build intelligence into the questionnaire pays off in time and cost savings, and improved quality, at later stages. In addition, the ability to quickly modify the questionnaire and distribute new versions, without needing to print and ship paper forms (and throw away those already printed), encourages taking the time to refine the questionnaire. This results in faster and more trou-

ble-free analysis. Overall, spending more time on MCAPI design is worthwhile.

MCAPI costs

MCAPI has a much different cost structure than PAPI. It requires an up-front investment in software, hardware, and training, but eliminates most incremental costs except for design and interviewing time. Paper requires a minimal investment but has many incremental costs, on either a project or interview basis. Table 2 compares costs for the two methods.

These differences mean the two methods are cost-effective under different conditions. MCAPI is most cost-effective for projects with a relatively small number of interviewers, and a large number of completed interviews and/or a long and complex interview. A low number of interviewers requires less initial investment, and a large number of interviews, or a long questionnaire, means significant incremental costs to use

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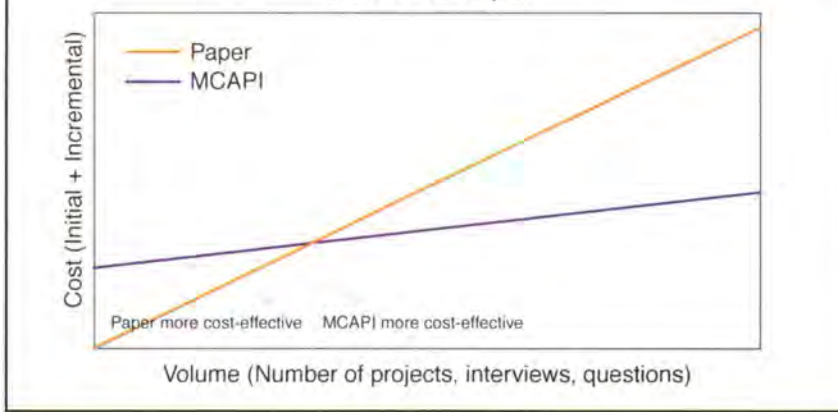
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Figure 1: Initial & Incremental Costs
MCAPI vs Paper



paper are avoided. The more projects and interviews an MCAPI system is used on, the better the return on investment will be.

On the other hand, if on-site data collection is required infrequently, and each interviewer will conduct only a few short interviews, the cost savings provided by MCAPI may be insufficient to cover the investment required within a reasonable time.

The relationship between total cost and the number of projects and interviews is shown in Figure 1. MCAPI has a higher initial cost, but at work volumes to the right of where the two cost lines cross, it is more cost-effective than paper.

You can roughly calculate return on investment for MCAPI by comparing

the initial cost of the MCAPI system (software, hardware, and training) with the money saved by eliminating questionnaire printing and shipping, data entry setup, and data entry. MCAPI software vendors may have more detailed ROI calculators available.

Additional MCAPI advantages

CATI and Web interviewing have been studied to determine such things as respondent comfort and satisfaction with the method. MCAPI has not yet been examined to the same extent. The research that has been published, and comments by users, do indicate that the method is viewed positively by respondents, interviewers, and clients.

Respondents generally view interviewers and the organization sponsoring the research as more professional when handheld computers are used instead of paper and a clipboard. This is especially true for complex interviews where MCAPI avoids the delays and confusion of figuring out which question to ask next. Interviewing outdoors in windy conditions does not require contortions to keep the paper flat on the clipboard, or mad dashes to capture questionnaires that have blown away. There is evidence from other CAI methods that respondents feel their answers are more accurately recorded, and more confidential, when entered into a computer.

Interviewers feel more professional when using MCAPI. In part this comes from eliminating some of paper's problems, such as fumbling with multiple sheets of paper, and trying to figure out what to ask next while the respondent waits. Interviewer self-worth seems enhanced by being trusted with a piece of sophisticated equipment. The benefits are that interviewers have a more professional attitude towards respondents, and the ability to focus on the interaction with them instead of on handling paper and navigating the interview.

Research buyers appreciate the professionalism and quality that MCAPI provides compared to paper. This is not surprising given that they have come to expect the advantages of CAI for other types of data collection, such as telephone interviews.

MCAPi in action: Example 2

FairControl is a company that provides business intelligence services to major exhibitors at trade fairs, conferences, seminars, and other events around the world. Bjoern Jopen, founder and co-chairman, sees a real impact from his firm's move to MCAPI. "The business has grown. If we approach a client, especially in the IT or telecoms industry, they can instantly see we are professional and innovative. It solves many of the logistical problems of interviewing and means we can be much more flex-

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ible. We can react very fast to changes. It also saves a lot of time and stress for our project managers. This clearly gives a better impression to the visitors and exhibitors to trade fairs where we interview.”

When to use MCAPI

MCAPI instead of paper

Paper is an exceptionally mobile format, but there are times when MCAPI should be used instead. Certain characteristics of the project and research design indicate when MCAPI is preferable.

- Speed is vital

Paper questionnaires must be laid out, printed and shipped. Once the questionnaires are printed, any modifications add cost and delay the project. It takes less time to design and deploy a questionnaire with MCAPI (design may take longer, but the speed of deployment more than makes up for it). The press of a button can download or transmit a questionnaire to handhelds around the world, and interviewing can begin at once. A good MCAPI system allows quick modifications, even after going live, while tracking all changes to ensure data integrity.

Retrieving MCAPI data is just as rapid. The data contain fewer errors, so cleaning takes less time. Some MCAPI systems will effortlessly transfer the data into analysis and reporting tools, saving even more time. Paper must be physically returned, and the responses key-punched – a source of delay and additional errors.

- The design is complex

On complex surveys, MCAPI simplifies life for the interviewer by automatically managing the flow and checking for errors. The questionnaire designer can ensure each respondent gets the right questions without being concerned about whether the interviewers can figure out which are the right questions. Automatic validation of data in the field can be built in, using range and logic checks, so inconsistent answers are discovered when they can still be corrected by asking the respondent for clarification. Calculations can be performed

invisibly by the system. MCAPI also eliminates the possibility of higher error rates when entering data for complex questionnaires from paper.

The quality of the interview is improved for respondent and interviewer. The interview is faster because there are no sheets of paper to sort through, and no getting lost in a complex design. There is no risk, with proper design, of confusing or offending a respondent by asking inappro-

priate questions.

- Quality is paramount

Quality may be more important than the cost of data collection when errors have significant costs. Drawing inaccurate conclusions about a new product introduction is one example. Another is ruining a unique data collection opportunity, such as an exit poll during an election. Quality of the interview experience may be a concern with certain groups that are hard

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to involve in surveys, such as doctors. Even when the other advantages of MCAPI cannot be realized on a project, improved quality may make it the best method.

MCAPI in action: Example 3

Aaron Percefull from GLS Research in California explains difference MCAPI makes for one of the firm's clients. "Our client is particularly happy with the handheld interviewing technology because it permits them rapid access to data. Since September 11, the client has asked us to conduct year-to-year comparisons by month of Las Vegas visitor behavior. We are able to produce these reports within a very short time after data collection, whereas if the surveys were still being done on paper, we would need at least a couple of weeks just for keypunch. So, the big advantage of [MCAPI] is the elimination of time-consuming, costly, and error-prone keypunch of pencil-and-paper interviews. Because [MCAPI] permits a very high level of internal error

checking and verification through the use of scripts, interviewer input errors can be kept to a minimum."

Paper instead of MCAPI

There is one case when paper may be superior to MCAPI due to its low initial cost and widespread use. This is when many people must be surveyed at one location in a very short time frame. Imagine you need 800 completes from people who are leaving a special event. You have 20 minutes before everyone has left the site, and the questionnaire takes five minutes. A large number of interviewers and handhelds (267) would be required for the project using MCAPI. Because most people know how to fill out a paper questionnaire with minimal assistance, a self-completed paper questionnaire could be distributed and collected by a much smaller number of field staff, and no handhelds would be required. The cost would be much lower for paper, making it the right choice if it can handle the design and provide adequate speed

and quality.

MCAPI instead of other CAI methods

Replacing paper is the role MCAPI fulfills best. However, you may already be using another CAI method instead of paper in situations where MCAPI is more appropriate. Certain characteristics of the setting and respondents indicate when MCAPI interviews on-site will be easier and produce better results than other CAI methods.

Setting and experience matter

Respondents' views can be greatly influenced by the setting they are in. They are also far more willing to talk about an experience when it is relevant to them — typically in the midst of it or immediately afterwards. Responses from people who are commenting directly on the experience may be very different than those based on their intentions before the experience, or their recollections afterwards. Finally, an interviewer on-site can observe the respondent's actions within the environment, in order to validate responses or gain additional insight. When the setting matters or the experience is transitory, but respondents cannot be reached at the right time or place with phone or PC-based Web interviews, then going on-site with MCAPI is a desirable approach.

Retail, health care, and tourism are some of the areas where setting and immediate experience have proven to be extremely important. In addition, there are specific on-site research techniques such as "assessment in context," "in-situ research," and "experience sampling." MCAPI delivers the advantages of CAI in all these situations.

MCAPI in action: Example 4

Portland, Ore.-based Sorensen Associates conducts in-store research. According to Sorensen's Michael Gibney, relevancy is a key to getting good data on purchase decisions. "Ask about what they are buying when they are buying it, not when their mind is on something else.

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People are more willing to participate. You get better answers the closer you get to the checkout — to the point of actually laying down money for a product.” Sorensen’s clients are often consumer packaged goods manufacturers working on new product development, and the speed of MCAPI is very valuable to them. “We can cut two to three days off a project, from design to top-line, compared to using paper,” Gibney says. “MCAPI takes the questionnaire logic away from interviewers and puts it into the handheld device, so less training is required, and errors are reduced.”

Respondents are dispersed or low-incidence

Need to reach respondents who are widely dispersed? If you can identify a time and location where they gather, then interviewing at that point is a very efficient approach. For example, an amusement park may draw visitors from all over the world. Reaching them on-site is easy; contacting them any other time is a logistical nightmare.

What if respondents have a low-incidence in the general population? Normally it is expensive and time-consuming to get an adequate sample. If they are drawn to a particular location or event, however, a concentration of respondents with the particular characteristics you seek may be created. Interview at special or recurring events, such as arts festivals or medical conventions, or at locations that cater to the group, such as woodworking stores or daycare centers.

The key to efficient surveying of widely dispersed or low-incidence respondents is to identify occasions where they gather, and meet them there. If mobility is required to do so, then MCAPI is the most appropriate method.

MCAPI with other methods

Specific project considerations can lead to the choice of multi-mode data collection. In such cases, tying together data from different modes is always a concern. MCAPI is capable of doing this in a number of ways, from sys-

tems that offer a common design tool for all CAI methods including MCAPI, to linking based on automated date and time stamps, to the ability to scan data using bar codes or magnetic stripe readers.

MCAPI in action: Example 5

Parks Canada is the agency is responsible for Canada’s National Parks and National Historic Sites. The agency needed information about tour

bus groups, which make up a significant proportion of visitors to locations in the Yukon Territory. Two key problems the data collection method(s) needed to address were:

1. Getting enough data. Buses stopped at a location for about 20-30 minutes, making it impossible to personally interview more than one or two of the 40 or more passengers on each bus;
2. Getting reliable data. “If it’s

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Table 3: Interview Method Suitability

	MCAPI	Other CAI	Paper
Setting and experience matter; observation useful	✓	x	✓
Closeness to key decision required	✓	x	✓
Desired respondents frequent a particular location(s) but are hard to reach otherwise	✓	x	✓
Speed is vital	✓	✓	x
Quality is paramount	✓	✓	x
Questionnaire is complex	✓	✓	x
Large number of projects/interviews/questions	✓	✓	x
Need to interview a large number of respondents at one location in a very short time	x	x	✓

Tuesday this must be...?" The intensive schedule of the tour groups meant passengers were not reliable sources of information about where they had come from and were going to next.

The solution was to combine paper questionnaires and MCAPI interviews. The bus drivers had nothing to do during the stops, so they were interviewed using MCAPI while the passengers visited the site. The interview collected data about the tour bus company and the group's itinerary, from someone who could provide accurate information. As the passengers returned to the bus, each was handed a mail-back OMR (optical mark reading) scannable questionnaire. Unique bar-code serial numbers pre-printed on the questionnaires were scanned into the interview record on the handheld as the questionnaires were given out. The passengers completed the questionnaires on the way to the next stop, where they could simply be dropped into a mailbox. Passengers had fewer questions to answer because information about the group had already been provided by the driver. When the returned questionnaires were processed, the OMR scanner

read the bar-code serial numbers again, providing a highly accurate link to the MCAPI interview data.

In this case, the research user and fieldwork suppliers knew what data collection methods were available, and the strengths and limitations of each. By thoughtfully combining different methods, a way was found to collect enough data and ensure high quality, while making the survey as effortless and enjoyable as possible for respondents and interviewers. That's a strong argument for becoming familiar with different methods.

Choosing MCAPI

So now that you have a broader selection of interviewing methods available, how do you choose among them?

Depending on the research question, one method may be more appropriate than another. Part of the expertise you must develop as a knowledgeable client, researcher, or fieldwork supplier is knowing which method is most suitable for a particular interviewing situation. At times projects may even require multiple methods.

A tourism research project, for

example, may look at all the phases of the tourism experience: anticipation, travel to destination, on-site, return, and recollection. A pop-up Web survey on a destination's Internet site would be one way to ask questions about the anticipation phase, but MCAPI would not be very useful. On the other hand, phone or Web interviewing is not feasible during the travel, on-site, and return stages. Picking the right method(s) for a particular stage will get the desired information most efficiently. The only way to make that decision correctly is to know the strengths and weaknesses of each method.

Table 3 summarizes the suitability of MCAPI compared to other CAI methods and paper.

Not always the answer

As with all new technologies and methods, MCAPI promises benefits, but quite literally is not the answer to every data collection requirement. This first part of this MCAPI primer explained what MCAPI is and when it is appropriate. For those of you who already see a role for MCAPI in your research activities, Part 2 will discuss the parameters for choosing a MCAPI system, and the implementation issues you should anticipate. Those who aren't yet sure how they could benefit from MCAPI but want to learn more should check out the resources listed below. ¹⁹

Suggested resources

Technos Systems Inc. Mobile data collection case studies, bibliography, and newsletter; hardware selection information (www.technos.com).
 Point-Of-Purchase Study Group (POPSG). Contacts and bibliography (www.pops.org/index.html).
 Tim Macer Services. Software directory and reviews (www.macer.co.uk).
 Association for Survey Computing (ASC). Software directory, conferences, presentations about different CAI methods (www.asc.org.uk).
 Couper, M.P., R.P. Baker, J. Bethlehem, et al. (eds.) (1998) *Computer Assisted Survey Information Collection*. New York: Wiley. The only book about CAI, it does not cover MCAPI in depth, but identifies relevant issues for all forms of CAI.
 Stewart, William P. & R. Bruce Hull (1996) "Capturing the Moments: Concerns of In Situ Leisure Research." In Daniel R. Fesenmaier, Joseph T. O'Leary, & Muzaffer Uysal (eds.) *Recent Advances in Tourism Marketing Research*. New York: Haworth Press: 3-20. Copublished in *Journal of Travel & Tourism Marketing* 5(1/2): 3-20.



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The questionnaire *that launched a thousand responses*

By David Ashley



Editor's note: David Ashley is a market research specialist at the U.S. Small Business Administration, Washington, D.C. He can be reached at 202-205-6868 or at david.ashley@sba.gov.

“It is a capital mistake to theorize in advance of the facts.” Easy for Sherlock Holmes to say, but then, he never administered a questionnaire. Although writing a good questionnaire takes time, following some guidelines can make the process easier and more productive.

Given that survey rules are seemingly numerous, how can you make sense out of writing an effective question-

naire? Remember, a questionnaire is best developed by first dovetailing your secondary research with primary research. Primary research might include a focus group or interviews. After you have laid the foundation, begin drafting the questions — all the while keeping true to your research design and research objectives set forth at the beginning.

- First, it's best to be clear and concise about what you are asking. Be vigilant in ensuring that the questions are sufficiently related, thus enabling comparative analysis between and among concepts. When writing a question, ask yourself what would be a natural fol-

low-up question. Is that follow-up question in the questionnaire? Stand-alone questions will likely limit your analysis to descriptive observations when generally an analytical approach is more revealing.

- Testing the questions and topics in a focus group is desirable. A hodgepodge of unstructured questions might yield unhelpful results and discourage survey participation since the questionnaire might appear to be lacking a clear structure or natural flow. Conducting a focus group beforehand will help identify the most effective ways, or words, to use when asking questions — especially sensitive questions. Consider ask-



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ing general questions at the beginning and invasive/sensitive questions towards the end. The respondent is best led into the questionnaire gradually and naturally. Pelting the respondent with thought-provoking questions too early might discourage the respondent from completing the questionnaire. Also, you should benefit from having done sufficient participant screening to avoid using valuable space asking unnecessary questions such as “Do you own a cell phone?” if you have obtained a mailing list of cell phone owners for the survey.

- Ensure questions are grammatically simple, brief, and use the respondents’ core vocabulary — as identified perhaps in a focus group, interviews, or secondary research. Avoid jargon and acronyms as they will likely only be of interest to the questionnaire author. Testing the questionnaire before it’s distributed will better your odds that the respondents will interpret the questions the same way once the final draft is ready for distribution. Consider the question, “Where do you get your allergy shot?” One might respond, “At the doctor’s office” and another respondent might reply, “In my right arm.” Keep in mind that one’s frame of reference is driven by their individual, and unique, experiences, background, culture, etc.

- Be wary of asking respondents to guess what they might do. Asking, “Will you read *Consumer Reports* before you buy your next car?” might lead you to respond “yes” because you might feel that’s what you should do. However, when in the throes of being wooed by the proverbial unctuous sales rep, you might not actually read *Consumer Reports* before you buy. Instead ask, “The last time you bought a car did you review *Consumer Reports*?” It is generally more revealing to ask what people actually did rather than what they might do. This approach clarifies what actually happened as opposed to what people say will happen. Consider that during election polling, spinmeisters are generally more interested in “likely voters,” as measured by those with a history of voting, rather than members of the general public who might say they will vote but wind up not voting.

- Avoid asking questions the respon-

dent is not qualified to answer or questions asking the respondent to recall specific examples when a general recollection will suffice. For example, “How much did you pay for milk last month?” could be rephrased, “The last time you bought milk, did it cost more or less than the previous time you bought milk?” In this case, the respondent’s specific recollection might be less accurate than the memory of overall milk price — as compared to the previous milk purchases. Correct general data is preferable to incorrect, guessed-at, specifics. Also undesirable is asking two questions at once. “Did you receive fast and friendly service?” sadly appears to be a mainstay of restaurant surveys. Well, the waiter might have been as friendly as the day is long — which coincidentally was the length of time it took to be served. It might be difficult to answer this question accurately.

- Other question pitfalls are both overstating assumptions made in the question — “Are you against cigarettes because they can kill people?” — and asking respondents to answer on behalf of the general population — “Will the public support the president’s proposal?” You might believe cigarettes are harmful to your health but you might not feel they “kill people.” On the latter question, how can you be expected to speak on behalf of the public at large? Please note however, if you are gauging the respondent’s perception about the public, it might be appropriate to ask them to speak about the public — but make sure your intention to measure perception is clear. Avoid using the respondent’s perception about the public as factual data about what the public might do.

- Asking for information obtainable from other sources, such as internal databases, might have a negative effect on your response rate. How does it feel after you have dutifully punched in your credit number over the phone only to be asked by the agent upon getting through, “May I have your credit card number?” Respondents appear to have dwindling tolerance for being asked questions the questioner should know or for being asked the same question twice. You might want to couch the same ques-

tions in a different light if you are trying to measure questionnaire reliability — a measure of the consistency of answers a respondent provides.

Lies, lies and damned statistics

Reviewing the four types of data will position you to maximize the effectiveness of your questions. The proper use of these data types will greatly enhance your analysis and final product. Use nominal (the least sophisticated data), ordinal, interval, and ratio (the most sophisticated data) questions throughout the survey. A cross-section of the four types of data will maximize your data analysis options. Remember that more sophisticated data can be revised down to lower-level level data during the analysis phase — but the reverse is not advisable. The hint here is to use as much higher-end data as appropriate.

Scaling is also an important component of creating an effective questionnaire. When possible you should use similar scaling throughout the questionnaire lest you risk confusing the respondent. Similar scaling facilitates data analysis and makes it easier for the respondent — which in turn generally increases the respondents’ willingness to complete the questionnaire. Although they are useful, be aware that odd-numbered scales might result in a disproportionate number of middle, or neutral, responses. For highly controversial issues, a middle response such as 3 on a 1-to-5 scale might be the respondent’s finessing of what might likely really be on his mind. Questions that are deemed truly more prone to a neutral attitude (which can be somewhat clarified during the secondary research and focus group phase) might not be negatively affected by giving the respondent the neutral option as there is ostensibly no need for the safe haven of a neutral response. There is no ironclad right or wrong on the odd vs. even issue; just be aware of the implications of your choice. Generally, the best choice between the odd vs. even argument lies in the question itself. Some questions are better asked with an odd scale and others with an even scale.

Use interval scales to measure attitudinal responses and ratio scales whenever appropriate as they can always be

converted to interval or ordinal data for crosstabulation. Although open-ended questions have advantages, summarizing response can be tedious and difficult. Generally, open-ended questions should be placed towards the end of the questionnaire and should be used sparingly since they require more time to complete and are more difficult to quantify. Probed open-ended questions such as, "List three specific attributes you like about this product" might yield more useful information than unprobed questions such as, "Please comment on the product." The latter question is so open that you will likely get a wide array of answers — some more useful than others. Giving the respondent some framework within which to respond will generally result in the respondent's completing the open-ended part of the questionnaire more precisely.

Life is tough enough, so avoid using a scale beyond 10 points. Ten-point scales are often used since respondents can generally relate to such scales relatively easily. Nine- and eight-point scales are not generally desirable since one man's "7" might be another's "6" even though they share the same opinion, they are simply interpreting the same scale differently since there are too many gradations within the scale. Seven- and five-point scaling introduce the neutral response issue. If you are using an odd scale, the middle response is less obvious to the respondent on a seven-point scale than on a five-point scale — although most often you will find five-point scales. A three-point scale might be used for ordinal response questions such as "small," "medium," and "large" and a two-point scale might be useful for semantic-extremity responses such as simply "yes" or "no." Scaling is also dependent on the level of attitudinal diversity in your sample. Generally the more diverse the respondents' opinions, the broader the scale should be. However, the scale should not be so large as to cause too much differing interpretation as to the intervals within the scale. Often, through a focus group or secondary research, the researcher can gain a general understanding of what


scales are appropriate. No one scale is necessarily right or wrong, but some scales are better than others given certain circumstances. The appropriate scale depends on the nature of the question itself and the information you hope to glean from the responses. Ten-, six-, five-, and four-point scales are generally the most common.

Make sure the questionnaire is attractive and has a consistent appearance throughout. Start with a statement informing the respondents of the survey's purpose. Remember to ask for participation rather than assuming they will participate. Be careful not to include too many fancy fonts, underlining, and bolding. Using plenty of white space will make the questionnaire uncluttered and numbering the questions will facilitate responding.

Incentives and follow-up calls/e-mails are effective ways to increase questionnaire response rates. An introductory letter/e-mail will alert the respondent of an impending survey. Obtaining an appropriate sponsor or affiliation might improve your standing with respondents and increase their likelihood of completing the survey. Personalizing the questionnaire and offering a monetary incentive or other gift also help increase survey response rates.

Don't despair

A well-written questionnaire will increase your response rate. Be aware that you will most likely discover that a questionnaire you thought was perfect will have holes in it once your respondents complete it. However, don't despair, it happens to the best survey researchers around! It's difficult to predict precisely how respondents will react to and interpret your questionnaire. Consequently, you might want to revise your next questionnaire to account for issues raised in previous questionnaires. Finally, remember these two key snippets — keep the questionnaire as brief as possible and test it with an appropriate group before it's administered.

Now send it out and hope for the best! 

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The rewards of patience

A review of SPSS 11.5 and SegmentSolve
from Marketing Advantage

By Steven Struhl

Editor's note: Steven Struhl is senior vice president, senior methodologist at Harris Interactive, Chicago. He can be reached at smstruhl@aol.com.

They say good things come to those who wait. Well, SPSS must have had that old saw in mind when readying Version 11.5 of its flagship software, because we now have an update that was worth waiting for.

The program includes some excellent

features that have been notably absent throughout SPSS' fast-paced schedule of releasing both major program revisions and new products. This article will discuss these enhancements, as well as some features that have remained the same. We also will cover a remarkable integrated data analytic application called SegmentSolve that arrives as a mature and feature-laden application from an experienced Chicago-area software developer. Now

that we have all of you trembling with anticipation, let's proceed to the reviews.

A wealth of valuable new features in SPSS Version 11.5

We will leap directly into the what's new in the program here. (Those of you who want a review of some SPSS basics might wish to skip ahead to the next major section before reading this.) SPSS has boosted the basic capabilities

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of its software package, brought an entire procedure into the realm of usefulness, and added a new dimension to a familiar set of routines. Aside from this, it has again appended a set of individual new features (most likely of interest to specialists) that would fill several pages. This is quite remarkable for a product given only a “fractional” (actually decimal) increment to 11.5. We only can wonder what they might have in store for the time they again reach whole numbers, with Version 12.

SPSS output now entirely readable by other programs

In all earlier SPSS versions, the program’s output could be read only by SPSS itself or its companion Smart Viewer. Now you can export everything in an analytical session so that it can be read and used by either Microsoft Excel or Microsoft Word — even if not exactly in one step. All the charts in the output will go out either in “rtf” format — which Word opens intact — or in the “xls” format used by Excel. All formatting is retained, with practically no hitches. (Only on some occasions with a highly complex chart did some cells that were merged originally need to be re-merged by hand after the transition to Excel.)

Here is the small catch in this. Any graphs or other non-table objects (including, for instance, the character-based territorial maps produced by discriminant analysis) need to be exported separately into another format. Which format you choose matters. Some of the export options, like extended metafiles (“emf” format) can go into another program and be edited there, element by element. PowerPoint, for instance, does particularly well in allowing you to customize any part of a chart after “ungrouping” it (an option offered with a right-click on the mouse button). Some chart export formats, though, like JPEG and “bmp,” remain collections of dots, and can be touched up only by using a photo-editing program.

Graphs created in SPSS cannot be manipulated as “live” objects in other programs. That is, basic properties like the scale used on a chart axis remain as they were in SPSS. Unfortunately,

SPSS still gives less control over many charting options than does a program such as Excel. For instance, your reviewer remains frustrated in his efforts to change the starting and stopping values on the axis of an SPSS graph.

To get complex charts to appear very much as you would like them, you will find the SPSS companion product, DeltaGraph, a much better choice. (We reviewed DeltaGraph in an article here last year.) Oddly enough, DeltaGraph has been engineered to work inside Microsoft Office programs, like Word and Excel — you can call it up without leaving these programs and create charts with all of DeltaGraph’s features — but it does not work inside SPSS itself.

Even with these limitations, the new export capabilities are a most welcome addition to SPSS. Now all parts of an analysis can go into files that the ubiquitous Office programs can use. This is a far wiser and more useful strategy on the part of SPSS than their former approach — which seemed to include the implicit assumption that anybody wanting to review all the output from an analysis also would want to buy either SPSS or the Smart Viewer program as well. This move by SPSS to more interconnection with other programs marks an important step toward true integration of analytical results with other documents.

TwoStep Clustering handles more variable types

SPSS has included a major new capability in its clustering routines. With the new TwoStep Cluster, you can now include categorical data such as job titles or regions (or yes/no responses) along with the usual scalar or continuous data that you have always used in clustering.

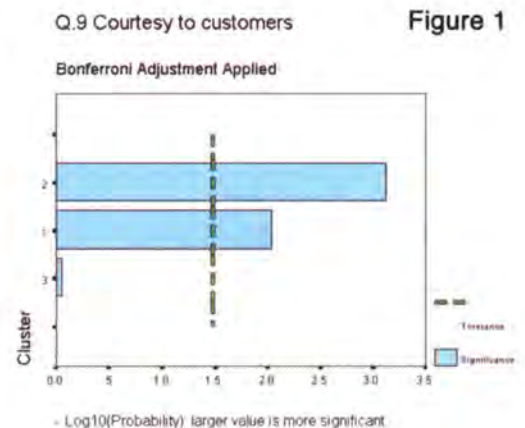
TwoStep Clustering is an entirely new application, and this shows in positive ways. It communicates more fully about the solution than any other SPSS clustering procedure, giving an estimate of how

important each variable is in the clustering solution, and providing charts that help understand in which groups of variables provide the strongest differentiation. These charts (Figure 1) could serve as impressive additions to a report. Also, the procedure includes some advanced options for handling outliers or unusual cases — which can spoil clustering using a more traditional approach. Also, you can set the program to locate what it deems the optimal number of clusters — although here, information on how the program defines what is best remains somewhat sketchy (as we will discuss below).

The program’s interface is clear and straightforward. It is easy to get the basics of this program working. Following the guidelines provided should lead to good solutions.

However, this new application underscores the weakness that this reviewer perceives in the SPSS help system. TwoStep Clustering involves several concepts that will be new to most users. The SPSS help system does nearly nothing to explain these and provides no pointers to references that might do so. Comparing SPSS with the much less expensive NCSS, which provides both extensive tutorials and lists of references, we can see that SPSS has ample room for improvement in this area. Now that manuals no longer come with SPSS (this alone is worth a whole section of the review later), this lack is particularly salient.

Nonetheless, quibbles about the help system aside, the many new features that display and help interpret results in TwoStep Cluster represent a major



improvement over all other clustering methods in SPSS. Your reviewer hopes that this new program foreshadows enhancements that might appear in these related procedures.

Tables come to the land of the living

Tables in SPSS now provide a useful addition to the analytical and presentation-related capabilities of the program. You now can create tables in real time, seeing how multiple column and row definitions work together before you give the OK to the final version. This uses a true graphical user interface (or GUI, pronounced "goeey" — in the infamous tradition of computer acronyms that has given us SCSI or "scuzzy"). You push and pull variables to form columns and rows, and you can run several variables across the page like a banner, or several variables in the rows, as you could in a large-scale tabulation program. Once you have your GUI output looking the way you like, you can paste the SPSS commands corresponding to its creation into the SPSS syntax window, and recycle the

table format by substituting other variable names. This feature can save considerable time, especially when working with more complex tables.

The new tables module has several other useful features. You can display or exclude categories with no counts (or responses) — leading to clearer output. The module even allows statistical testing, with some adjustment for drawing comparisons among three or more columns. Even though this is a relatively simple Bonferroni correction (which can be overly demanding in declaring differences significant), it is far better than doing nothing, and about as good as anything produced in large, commercial tabulation packages.

Especially when compared with the frustrations of making tables in the old fashioned way, this module has made enormous progress, and now takes its rightful place among the many other useful routines in SPSS.

Data restructure wizard makes data more flexible

In version 11, SPSS added a strong

new capability to rearrange data files. Starting with that version, you could change data to and from the so-called univariate layout — or several records per respondent — to and from the multivariate layout — or one record per respondent, and vice versa. This capability could be handy if you have data arranged in ways making it impossible to do certain analyses. For example, repeat measures analysis of variance requires data in the multivariate layout, with the repeated measurements all recorded on one line per respondent. Following version 11, even if the data came with the alternative many-records-per-respondent structure, you could rearrange and use it.

To this ability, SPSS has added a new data wizard that allows further restructuring of your data. You can either restructure selected variables into cases or restructure selected cases into variables. Alternatively, you can transpose all the data in the file: All rows will become columns and all columns will become rows in the new data. The use of a wizard to guide this process makes



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it possible for users at all levels of expertise to get it done correctly. This is another valuable program feature — more so as we deal increasingly with data from a wide variety of sources with varying levels of eccentricity in their layouts.

More connectivity: talk to the SAS and IBM OS communities

SPSS now allows direct export of SPSS data files to seven types of SAS data files (including Windows and UNIX versions and a transport file). You can also save SPSS value labels to SAS .sas syntax files — thus eliminating one of the main frustrations in making transitions between these two statistical heavyweights; no more loss of detailed labeling information going from SPSS to SAS.

Those needing to interchange files with IBM database users will be pleased to find that SPSS now has connectivity to DB2 UDB v. 7 for OS/390 and DB2 driver for AS/400, even adding ability to read z/OS, Oracle 9i, and Sybase 12.5. SPSS also can access directly mainframe data sources on OS/390, including mainframe data such as Adabas, Datacom, IDS, OS/390 Sequential Files, IDMS, VSAM and ISAM. (This section will not be on the quiz at the end of the article.)

There are many other enhancements to the product, some small and others doubtless important to various readers. A full list can be found on the SPSS Web site (www.spss.com).

Reviewing the basics about SPSS

With all its new features, SPSS retains its basic program structure (a base program with added modules that do more specialized or advanced tasks). The base covers many basic tasks and some more advanced ones. To have the full range of capabilities in SPSS, though, you would need to purchase not just this but also several add-on modules. Most important among these are the advanced and regression models modules, conjoint (which both generates the required fractional factorial designs and does the analysis), trends (for time series analysis), categories (for correspondence analysis and related procedures), and perhaps the special

module for missing values analysis. If you work with small samples, you might also want the SPSS exact tests module, which returns incredibly precise statistical test results with limited amounts of data.

SPSS still works with three basic windows — each free-floating and given its own space in the task bar at the edge of the Windows screen (that's the bar on the bottom for most users). One window contains the data, and looks much like a spreadsheet, but one which has no limits on columns and rows and which has an extra pane showing the characteristics of each variable. Another window handles the output from the analyses you run — and we will have more about this shortly. A third window — that many users may never see — can accept typed commands, which still work as well as making choices from the numerous menus and dialogue boxes to structure an analysis. This syntax window opens only if you request that it do so, or if you use the SPSS option to paste a command instead of running it directly from the menus.

Once you paste a command into the syntax window, you need to select it and tell the program to run it. You also can modify pasted commands, recycle them by substituting new variable names, and keep them as a record of the session or to run another time.

The syntax window is mainly a regular text editor something like the notepad program that comes with Windows, and all SPSS command files are made up of plain text. Its main special feature is a button that calls up a help panel showing all the options that can be typed into the command. You also can paste these options directly into the command from the help panel. SPSS syntax files can be easily reviewed and read with any program that can handle plain text. No exporting is needed for these.

As we mentioned earlier, you need to go to companion programs to get some types of tasks done. In addition to DeltaGraph for charting, one notably useful companion program is AnswerTree for classification tree analysis. It includes routines for analysis using CHAID, QUEST and C&RT

— formerly CART before some geniuses managed to stick an ® mark on CART, which was the name of an analytical procedure. DeltaGraph does not rely on SPSS for any part of its charting, and has a fairly extensive set of tools for transforming and manipulating data it charts. AnswerTree, though, relies on you having a copy of SPSS to work best. That is, any data transformations or rearrangements that you need to do for an analysis to run as smoothly as possible in AnswerTree require SPSS to massage the data. (You could theoretically work on the data in another statistics program, and then try to export the results to AnswerTree — but this type of importing/exporting almost always is fraught with hidden problems.)

Some not overly modest suggestions

SPSS still lacks modules handling increasingly common tasks, such as generating so-called d-optimal (nearly optimal) experimental designs, or performing forms of regression that handle highly collinear variables, such as ridge regression or principal components regression. (SPSS has a sort of super-sized macro, or script, to do ridge regression that you can feed to the program if you are very, very good with SPSS syntax. This is hardly the same as a full-featured routine, though, and it does not help you choose the optimal values for the procedure to give the most accurate results.)

The basic “tree and output section” structure in the output window, used for organizing the results of statistical procedures, still has limitations. Unfortunately, in spite of temperate yet direct hints from this reviewer, the titles in the tree remain highly non-specific, doing little to guide you to the portion of a long analysis that you need. If you know enough SPSS syntax to type in the command specifying a title for a section of the output (and this is simple), SPSS does not put that text into the tree window where you can find it easily. Rather it inserts the supremely uninformative notation “page title” as shown in Figure 2. It would be far better if SPSS inserted the requested title text into the tree. Better still, SPSS might even consider putting a space in

the dialog box for each procedure where you would be prompted to insert a title. Is anybody at SPSS listening?

SPSS has kept several other eccentricities from earlier versions. Some useful commands remain unavailable from its menus, and so must be typed

ANOVA, like MANOVA, repeat measures, and factorial ANOVA are listed under general linear model (or GLM), but regression, which also is part of GLM, has its own main menu item — and discriminant analysis (also GLM) is found, as mentioned, grouped with clustering. Some procedures never appear directly in the menus. For instance, you get to MANOVA by selecting “general linear model” and then “multivariate.” In any event, your reviewer would like to give SPSS another polite but firm hint that the program’s interface has not yet reached the pinnacle of earthly perfection, especially for neophytes. We can only hope that somewhere in the not-too-distant future some alterations to the sticky areas discussed will wend their ways into the program.

Still less is still less

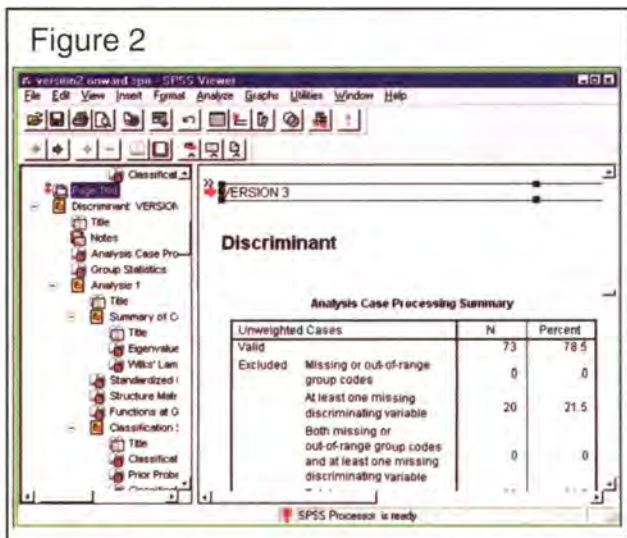
One unfortunate change in SPSS is the continuing elimination of program manuals. In the last version, all manuals except for one covering the base product disappeared from the package sent by SPSS, even if you bought many optional modules along with the base. Now even the base manual is gone, replaced by a slender, perhaps even emaciated, operations manual.

All more serious documentation for advanced procedures now is provided in PDF form on the installation CD-ROM. You also can install these electronic manuals on your computer’s hard drive. SPSS also has added some additional heft to its online help system and its tutorials. However, for some users (including your reviewer), the paper manuals remain indispensable.

If you want these, you now need to order them and pay for them separately. No doubt this saves something in production costs for SPSS, and it seems to fit with the apparent drive by the software industry to reduce all shipping products to no more than a bare CD packed inside a used shoebox. Your reviewer, though, wonders if all this economy is much of a service to the user. The extremely useful syntax guidebook has long been an extra cost item, so perhaps this change for the manuals was inevitable. I cannot too strongly recommend the syntax guide, even as an extra purchase. At times, it will provide an answer for a problem that does not seem to be addressed anywhere else. Again, a genuine book is handier (especially since you can hold it open on your desk as you work) than the corresponding pop-up screens in the help system of the SPSS program.

Also, with the elimination of manuals as part of the standard SPSS package, the program now effectively hides many of its most advanced capabilities. In particular, it has a relatively rich language for creating scripts or macros that could allow it to extend the range of its analytical procedures — as a look at its included ridge regression macro

Figure 2



into the syntax window. One example of a missing menu command is the option to rotate discriminant analysis solutions. Rotation of these solutions has much the same effect as rotation of factor analysis solutions, leading to clearer, more easily explainable results. To do this you must perform some careful surgery on the commands pasted from the menus, or just type everything from scratch. Similarly, the entire conjoint analysis procedure still requires use of the syntax window, with no menu equivalents.

We all know that typing syntax is good for you, with a particularly purifying influence on the soul. Nonetheless, newer users most likely will find going to the syntax window vexatious. Getting used to SPSS syntax and all the ways in which the program can act very picky about it — such as sanctions about the use of periods or slashes — can be a challenge to those not yet comfortable with the SPSS system.

The menus themselves can be somewhat unsettling until they become familiar, as mentioned in the last review. The grouping of the menu commands is not entirely intuitive — for instance, both clustering and discriminant analysis fall under the entry “classify.” The more complex forms of



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will give a hint. However, your reviewer senses that this language gets little use, as the near absence of user-submitted macros on the SPSS site strongly suggests. In this, the program lags far behind SAS, for which users have created all sorts of intricate routines that perform truly remarkable analytical exploits.

At the very least, SPSS could have devoted some special sections of the help system to describe the new procedures instituted in this release and how to use them. Your reviewer did not find full descriptions of these and how they work in one location.

SPSS 11.5 overall

Although no review would reach its true state of completion without some grumbles, we need to put these aside when summing up this release. The basic functioning of the program has changed with the elimination of the need for an SPSS "spo" (output) file to share all results with others. Clustering has undergone a major upgrade as well, with the ability of the new two-step procedure to handle both continuous and categorical data. "Tables" has become a useful application and far easier to use in the bargain. The program has improved its already formidable abilities to manipulate data. It communicates with other programs better, now becoming capable of creating files usable with several versions of SAS, while adding new capabilities for communicating with the world of IBM data files. These are all impressive accomplishments, even if SPSS has yet to see the true way and follow all of your unassuming reviewer's ideas.

SegmentSolve from Market Advantage Software

SegmentSolve is a mature and remarkably feature-rich application, as its version number (8.0) would suggest. Its creator, Market Advantage, has been developing software for many years, although primarily for the use of clients with whom they work as consultants. The firm's Web site (www.marketadvantageconsult.com) gives a clear indication of this part of their business interests. This firm has released a few commercial products in

the past, perhaps most notably about 10 years ago a highly creative brand mapping program in a partnership with SPSS. In those old DOS days (anybody else remember them?), this program allowed the user to manipulate the intensity of various descriptors related to a product and see in real time how its position vs. other products shifted. Unfortunately, SPSS then had not hit its stride in marketing programs by outside companies, and this inventive product somehow disappeared. Market Advantage nonetheless kept developing its software products, moving forward into the Windows era. SegmentSolve is the first of their products available for more general release.

In brief, SegmentSolve does much of the really hard work in choosing a "best" segmentation solution — understanding that it makes some basic assumptions about the definition of best.

Your reviewer apologizes here for continuing to qualify the words "best" and "optimal" — understanding that this could well sound something like Bill Clinton talking about what "is" is. Still, we need to understand that any segmentation solution declared "opti-

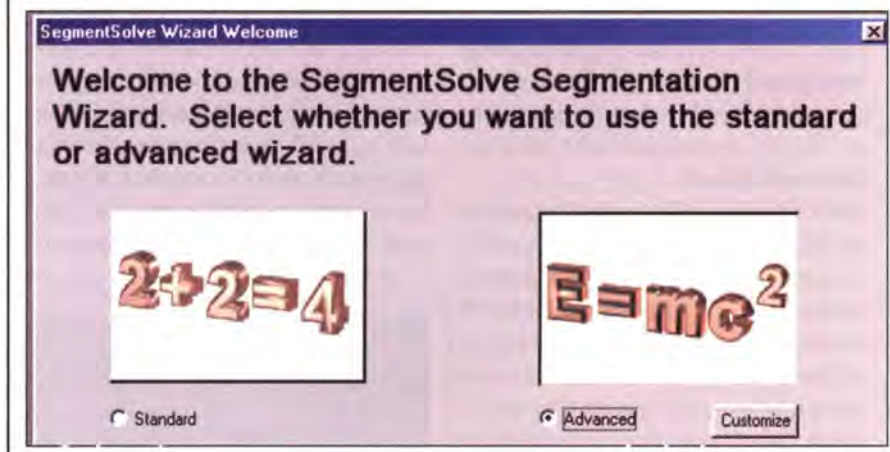
Arguments about which clustering algorithm works best raged furiously, at one time, among the more academically inclined. Those arguments seem to have subsided now, replaced by a realization that each method has tendencies peculiar to itself, and that in any event, all methods behave somewhat unpredictably.

The second half of the segmentation problem has received less systematic attention: namely, how to form groups which can be reached selectively. This problem goes outside the neat boundaries of any mathematical procedure, and has strong practical implications as well, so perhaps these considerations explain why academics have not spilled as much ink about it. A simpler answer may be that this is just a much harder problem than resolving how a mathematical procedure tends to group objects, including people.

SegmentSolve makes an earnest attempt to take some arbitrariness out of the first part of the process. It also takes a brave run at the second part of the problem, but finally addresses this in a more cursory way.

SegmentSolve is set up as one enormous guided procedure or wizard. In

Figure 3



mal" reaches this state when compared with some pre-defined notion of what counts as best. Segmentation must start with some way of grouping people, and then proceed to determining whether these groups can be found and reached selectively.

Much attention has been focused on the first part of this problem — ways of clustering people into groups.

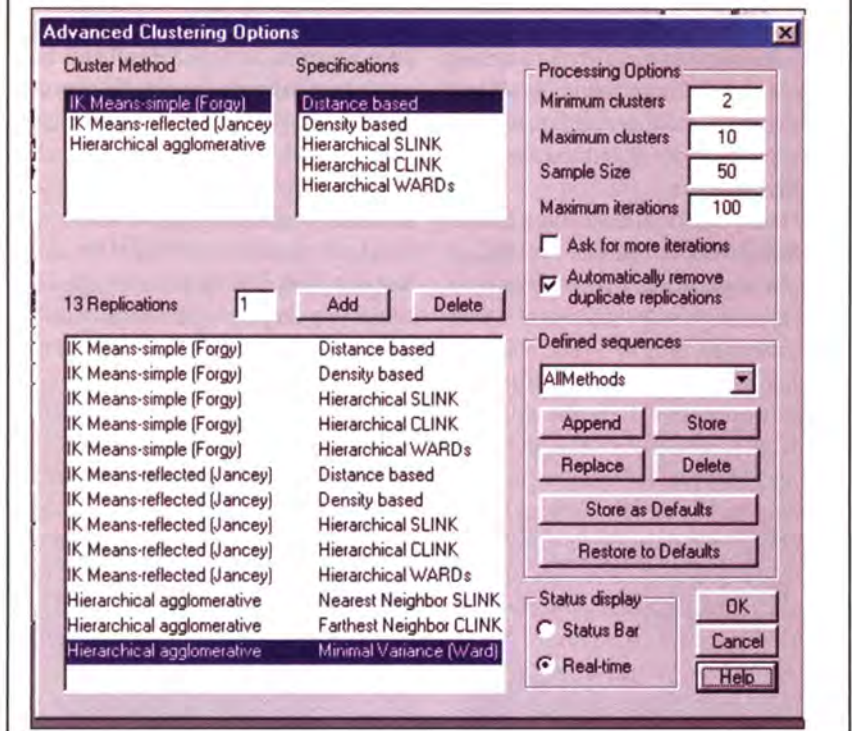
fact, you see a rather whimsical introduction to this wizard when you open the program, as shown in Figure 3. A handsome logo appears in the program's help screen, rather than at the beginning of the program (although it may just blink on for an instant on a very fast PC). You can choose to follow the advanced wizard, presumably if you feel something like Einstein, or the

standard wizard (perhaps if it has gotten to the time of day when you have serious questions about the true meaning of the question, "What is 2 + 2?").

The program will simultaneously run and compare results from up to 13 standard clustering algorithms, trying to settle on one that works best for each number of clusters in a range that you specify (say, anywhere from two to 10 groups), and then settle on an overall "winner." The program also gives some help to the user by identifying a main mathematical tendency of each method in its formation of clusters. (For instance, you can see whether you are picking a distance-based or density-based method — as you might more or less discern in Figure 4. The brief descriptions do not give all the tendencies of these methods, but at least a sense of how their biases work when "finding" groups in a data set.

I would like to give a more detailed report on the operation of this program under all types of adverse conditions, but this is not possible. While the copy I received for review worked, it worked

Figure 4



only with pre-selected datasets. I could not, for instance, feed the program a dataset that gave me a great deal of trouble with other clustering routines to

see how it performed — or how the program handled typically sloppy data, or data with extreme values intact.

The best advice I can give about use

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of SegmentSolve is just good general counsel for any clustering routine — check all data carefully for anomalies before feeding it to this program. It does not appear to be more forgiving of data irregularities — and certainly not well-hidden problem areas — than a regular clustering routine.

For instance, it will either drop a variable entirely if it has missing values, or fill up to a prescribed percentage of a variable's values with means (and if over that percentage, drop it) — and will treat all variables in an analysis the same way. It does not appear to have the ability to ignore missing values on a pairwise basis, as SPSS can, for instance, and has no more sophisticated routines for imputation of missing data. The program also apparently does not have any built-in procedures for examining the data you are trying to cluster, aside from a simple preview of the values in a variable. Therefore, even though the program has import routines for taking data directly from a simple ASCII database, it seems quite unwise to use this, rather than examining the data carefully with a statistics program before clustering.

The program will allow some data manipulation: you can standardize data (either across variables or within each respondent, or both) and you can specify that it accept values only within a certain range. Again, though, you must know what the acceptable range is from some other source or examination of the data.

Supposing you find your data ready for clustering, SegmentSolve will do tremendous amounts of work for you that can help you reach a good solution quickly. It will compare the various solutions it generates on a wide range of mathematical criteria, and even allow you to give more or less weight to these criteria in deciding which solution is “best.” If you, for instance, believe that balance among the clusters should be accorded more weight in the final solution than (for instance) the mean F-ratio among the groups, you can give each the precise proportion of the weight in picking “best” solutions that you want. SegmentSolve will consider only those criteria to which you give some weight.

Oddly enough, with its wealth of criteria for screening groups formed, it does

not include a cut-off for the minimum acceptable group size. While we do encounter incredibly large datasets more often now than ever before, clients also continue to ask for segments from smaller samples. Having the program automatically eliminate any solution that led to a group with fewer than whatever you deem an adequate group size would help weed out useless solutions with small samples. It also could act as a safeguard against finding a mathematically good-looking solution with a larger sample that creates small splinter groups. Perhaps SegmentSolve can include this feature in upcoming releases.

The program automatically identifies variables as either continuous or categorical, with the categorical variables set aside from the variables going into the clustering itself. These instead are reserved for use later in crosstabulation against the selected solution. You can tell the program to change its default (or “best guess”) definitions of the variables types, but those finally labeled as categorical must be used in the crosstabulations only.

That is, SegmentSolve's clustering routines all are traditional methods that can handle only data treated as continuous. The program does not include newer algorithms that can handle all types of data like the two-step method now part of SPSS or the fuzzy clustering found in NCSS.

However, once the program is done, you have quite a neat package of traditional clustering solutions, including a report in Excel format showing all “basis” variables (used in the clustering solution) crosstabulated against the categorical variables (such as demographics) that you specified during the analysis. This is as far as many organizations go with clustering before they decide that they have reached a segmentation solution. If this fits the practices and goals of your organization, then SegmentSolve will save you a great deal of time, and most likely do quite well compared with the solutions your organization has used in earlier efforts.

To reach a truly “optimal” solution, though, you will need to go still further. SegmentSolve will not look ahead to the demographic (or other categorical) variables set aside for crosstabulation

and choose a solution that provides the most differences based on these. That is, the ease with which groups can be characterized and selectively reached is not part of its evaluation of the solution. You, or your lucky data analyst, must look at the results and make this determination. It is entirely possible that the best mathematical solution (or even the several best) does not have groups that differ from each other strongly on the criteria that can be used to define and find them.

Beyond this, crosstabulations do not give the full picture of how groups differ. In nearly every segmentation solution that your author has reviewed in detail, variables such as demographics and media habits interact in meaningful ways. Simple crosstabulations will not directly show these interactions. Rather, you need to use a procedure such as CHAID or CART (or C&RT) that has been designed to tease out these interactions.

With this part of SegmentSolve we in fact reach one of the primary frustrations in segmentation. Namely, you can find mathematically pleasing solutions, but then discover in the later portion of the analysis that these numerically separated groups are not clearly differentiated in ways that help you reach each one (or just the most important ones) selectively. When this happens, you must go back to another solution, perhaps even one that is not mathematically optimal, to get groups that can be located in the real world.

If you are willing to look carefully at the SegmentSolve's output for a wide range of solutions, going all the way through the crosstabulations, you could well make some steps toward addressing this problem.

However, as suggested just a few paragraphs ago, we cannot argue that the solution producing the most differences on the level of crosstabulation is necessarily the best. Similarly, we cannot argue that crosstabs would reliably point us toward a highly useful solution that a more sophisticated method, such as CHAID, would uncover. (If for instance, the target segment has an extremely high incidence among women who are age 25 to 44 AND who live in areas near the center of urban

areas AND who have incomes of \$35,000 and up, this combination of characteristics may get lost underneath a wealth of other information in simple crosstabulations.) The only way to find information like this seems to include taking the time to use the best analytical approaches thoroughly.

If you allow the program to choose based on mathematically optimal criteria only, or if you let it find segments on auto-pilot (and please never do this), you will have simply stepped around this problem area. If using tactics like these, your finding the most useful solution would mainly become a matter of getting very lucky.

In short, SegmentSolve can serve as a highly useful tool for screening a large number of alternative segmentation solutions, and for eliminating many that clearly make no sense. However, you are well advised not to treat this software, as sophisticated as it is (or in fact any other piece of extant software), as capable of finding the "best" segmentation solution. That, then, is today's talk about what "is" is.

In conclusion


SPSS has added many useful features with this release. While it still does not have all the depth of its ultra-heavy-weight competitor SAS — or even some of the amenities in the much less expensive NCSS — it still combines an impressive range of features and a good level of ease of use. As mentioned, with the elimination of manuals as part of the standard SPSS package, though, the program makes many of its most advanced abilities difficult to find and apply. Yet SPSS still seems hard to use for novices, so the program can extend its reach in both directions.

Although it is fun (more or less) for your reviewer to continue in this vein, overall there is much to like about SPSS in its most recent release. Those of you who have been waiting for an important reason to upgrade now have several. We can only hope that SPSS will hit upon as many key improvements in upcoming releases. And of course, if they are wondering just how they could possibly do this — well, modesty forbids me from saying much about how they need only look at the rest of this review.

In SegmentSolve, you have a remark-

able tool to help you sift through a large number of alternative clustering solutions, which, if used with discretion, can lead to a highly useful segmentation scheme. Here is a program that automates tasks that would take hours or days of analytical time, and so will help ensure that you have adequately considered many alternatives before settling upon a solution.

Those of you who have not yet fallen off the edges of your seats with the

excitement of reading this, and who have contrasting points of view, are welcome to send rejoinders. Please be advised that we have carefully constructed spam filters for all the rudest words and phrases, and for expletives both common and uncommon (thus proving again that practice makes perfect). Therefore, recalling all that any maiden aunts may have told you about politeness, please feel free to send any comments to the reviewer at the e-mail address listed. 

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Editor's note: Beth McKeon is vice president, Design ForumResearch, Dayton, Ohio. She can be reached at bmckeon@designforum.com or at 937-439-4400.

There's a big hole out there in the body of retail research data regarding one key element of in-store signage: that of saturation. While a significant amount of research efforts have focused on what constitutes an effective sign and where to put it, little is known about signage quantity: how much is too much, too little, or just right for maximum communication effectiveness. This article details a research method, signage saturation analysis (SSA) that allows a retailer to systematically assess the current level of signage saturation and its effect on customers' identification

and interpretation of key messages. Also covered are key deliverables, such as what happens if signage saturation is altered, how to maximize the effectiveness of a signage program in terms of signage saturation, and how these key variables compare with those of the retailer's key competitors.

Central to the issue of retail signage saturation is the common practice of opportunistic signing, typical in many big-box retail settings. Simply put, when the philosophy "If you want to tell the customers something, add another sign," is frequently adopted, the result can be an overwhelming array of messages for the customer to digest. In fact, such a retail environment can reach the point of diminishing returns in which there are so many messages that the customers actually recall fewer and fewer of them. While

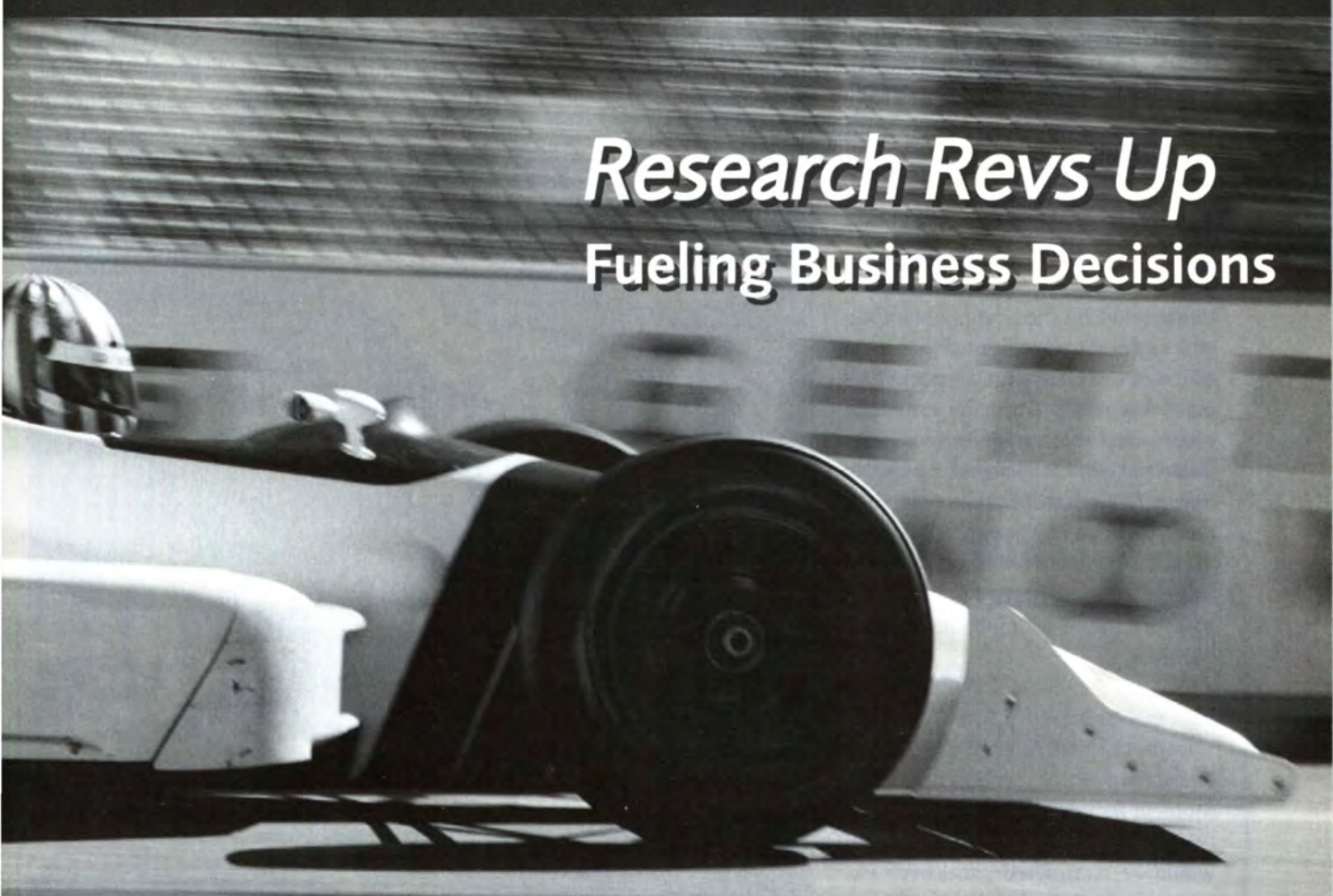
each sign could have been based on sound design and placement principles, the sum of all of them could be counterproductive. The key questions for retailers in this situation might be: "How do I measure the possibility that I'm at that point of diminishing returns?" and "How can I get to the point of optimal customer identification and interpretation of my existing or proposed signage?" SSA is a method designed to provide quantitative answers to such questions.

SSA is based on the ability of customers to recall messages seen in wide-angle views of the actual store environment as well as views in which successive layers of signage have been peeled away. Of course, two assumptions, both with substantial face validity, are made. First, there is an inverted U-shaped relationship between

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those with the most messages and, in the case of a tie, those that are most alike between stores as these will facilitate more valid comparisons. Next, these nine photos (three from each of three stores) must be graphically enhanced by someone with graphics software expertise (with, for example, Adobe Photoshop).

• Graphic alterations to each photograph. This, in our view, is the most important phase. This enhancement creates three to seven versions of the original photo by peeling away layers of signage a little at a time. In essence, the graphic artist starts with the original photo and creates new layers by removing certain sets of signs at a time. A graphics professional skilled in the use of a photo editing software package knows best how to remove each sign. This is because each message removed must be replaced by what would be behind it in the real store. Graphic artists use their own artistic skill as well as the features of the software to create a new layer that actually looks indistinguishable from

an actual photograph. In essence, each layer must look real.

Layering or peeling is where art and science must be applied together very carefully as the call for exactly what gets peeled with each layer can be rather subjective. From the "as is" photo, we often begin first by removing clutter on the floor (those items that would not be there at the store's grand opening). This is to test the hypothesis that removal of floor clutter improves overall signage effectiveness. Our recommendation for peeling each subsequent layer is to remove a set of like signs that a store manager would think he/she could most do without. This could mean removal of the signs of a certain promotion plus some selected handwritten signs that appear excessive. This is continued for the next layer (i.e., photo) until the last layer is one that appears to be too "stark" in terms of communications, resulting in as few as three and as many as seven photos. This, then, creates a menu of photos that go from the "as is" scenario with

the suspicion of too many messages, to the stark photo, with probably too few. This maximizes the chance of finding an optimal point of signage level if it, in fact, exists. Figure 2 is actually Figure 1 with clutter and some redundant signage removed.

This process is done for each of the nine photos. We recommend creating the same number of layers in each photo as this will facilitate movie preparation and counterbalancing, which are covered in the next step. Even if this requires less peeling per layer for one more than another photo, findings will not be confounded because layers are not directly compared to each other.

• Preparation of movies. Once the photos are prepared (i.e., layers of each are completed), they must be arranged into a "movie" — what we show respondents. The movie is a series of seven to 10 photographs shown to respondents one at a time with the purpose of testing their ability to recall messages seen. There are some key considerations for the prepa-

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ration of each movie.

First, the use of a versatile movie software package (i.e., Macromedia Director or Microsoft PowerPoint) facilitates easy import of photos and modification of timing and/or sequencing. Since they will be shown via LCD projector to one group of approximately 10 people at a time, resolution is everything. Therefore, any graphics enhancements (including re-sizing) must be appear clear and crisp when projected on a large screen.

Second, because a respondent will only see one layer of any photo in a movie, multiple movies should be developed to counterbalance photo sequence and level of peel. Each new group of 10 respondents, then, sees a different movie. Each movie should have one layer per original photo with different layers of the same original between movies. For example, in the case of nine photos and five layers of each, five movies of nine views each allow for all 45 images to be seen in counterbalanced fashion so each gets the same exposure with no bias. If 20 groups of 10 each are tested, then 40 respondents will see each movie, and, thus, each view.

Third, each movie simply consists of the nine or so views arranged in the order specified from above, with each shown for seven seconds. Seven seconds is the average period of time during which, based on our video ethnographic retail studies, most customers make evaluative judgments as to how effective store signage will be — beyond which most resort to asking for help due to ineffective signage. After viewing each, respondents are asked to recall what messages were seen by the use of a checkmark on an alphabetized list of possible responses including at least 60 percent bogus responses (those that are not seen in that view).

We prefer this quick ID method to that of writing down messages seen, as the latter measures more constructs than simple memory recall. Incumbent in this phase is the preparation of accurate checklists from which respondents can select their "correct" responses as well as an instruction sheet that the moderator can read from for every group (thus creating a standardization between groups).

• Administering the movies to respondents. This is a fairly simple procedure compared to those previously mentioned. Here, we recommend a focus group or mall research facility to accommodate the 50-100 respondents needed each night, in groups of 10 at a time, generally 30 minutes apart. While recruitment and compensation under such circumstances is certainly more expensive than simple store intercepts, we believe strongly that the sample should be most representative of the relevant customer base and the facility must provide for consistent viewing resolution, sound and lighting for each group. The moderator reads from an instruction sheet that walks respondents through the steps outlined above, showing each movie via a laptop and LCD projector.

Deliverables/key findings


Here are some hypothetical examples (i.e., the numbers are purely fictitious) of findings that could result from SSA:

- "As currently configured, Retailer X indicates 18 percent less recall of critical elements than its competitor, Retailer Y."
- "Removal of floor clutter alone improves overall recall by 25 percent."
- "The newer version of Retailer X's store has a signage level with 23 percent more correctly recalled elements than its older version."
- "At the third layer of peel, Retailer X exhibits 10 percent higher overall recall than any point of peel for its competitor, Retailer Y."
- "If one-third of the ABC Promotion signs are eliminated in Retailer X, recall of that promotion

does not change but overall recall of other messages increases by 20 percent."

• "Overall reduction of signage levels by 30 percent (perhaps two layers of peel) will yield an increase in overall recall by 18 percent."

We certainly do not purport that SSA provides the answer to every signage question. Rather, we suggest that SSA is a tool by which a retailer can learn more about the impact of signage quantity (or saturation) in the store and what to do about it. Furthermore, the computer-aided graphics component of SSA allows for new signs to be tested digitally without having to actually construct and install them. In fact, any combination of sign position, size, color, etc., can be evaluated in terms of customer recall using SSA. This means that SSA could be adapted to test scenarios in which signage quantity is suspected to be inadequate as long as digital capabilities exist to add new signs. We even see applications of the SSA methodology to new package design and vendor point-of-purchase displays.

As with any good research methodology, signage saturation analysis provides focused insight to specific research questions but does not solve every signage problem. Rather, it is a systematic way of quantifying signage saturation, effectiveness, and clarity for existing, prototype and competitor retail environments. It provides the flexibility to test many signage scenarios with large sample sizes and can yield specific recommendations for how signs can be removed or added to optimize effectiveness. In short, it is a new component in the retail researcher's toolkit, one with "teeth and traction." 

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Blueprints to successful concept development

Part 1: laying the foundation

By Camille Nicita and Christi Walters

Editor's note: Camille Nicita is vice president of qualitative research, and Christi Walters is vice president of business development, at Gongos and Associates, Inc., a Bloomfield Hills, Mich., research firm. They can be reached at 248-205-9500.

Would you ever build a house on a weak foundation — say, next to a legendary sinkhole or on a documented earthquake fault line? Most people would answer no. Yet considering that 80 percent of new product introductions and brand extensions fail each year, many companies are establishing residence for their brand and future new products on dubious foundations.

Successful product development, much like a successful construction

project, requires a solid foundation. Establishing this foundation prior to concept development supplies the blueprints not only to successful concept development but ultimately the development of products that consumers love.

This article introduces the four cornerstone pieces to successful concept development — consumer wants and needs, emotional connections, brand equity, and competitive landscape. It will define the strategy and rationale for these foundation pieces and explain why these cornerstones lead to concept/product success. A second article (in next month's *Quirk's*) will provide tactical approaches and specific tools (both qualitative and quantitative) for enhancing the concept development process.

On an individual basis, none of the cornerstone pieces are revolutionary. However, the approach described in this article provides a perspective on the importance of fully understanding each cornerstone piece prior to the development of concepts — a feat rarely accomplished! The most relevant and actionable consumer insight is achieved through the synthesis of all four pieces, not from a mere glimpse into one or two of the cornerstones, as is typically the case. And, while the end result of our cornerstone philosophy is consumer-driven product development it also offers the clear intermediate benefit of better decision making along the way.

Note: The philosophies presented in this article are applicable to both positioning and product concept develop-

ment. In essence, the product can be viewed as the more tangible piece and the positioning as what is done to the consumer's mind and emotional state. However, positioning is integral to the product, since it is the promise behind product delivery.

Consumer wants/needs

The first of the four cornerstones of concept development is understanding consumer wants and needs. As simple as it sounds, this is much more than asking what the consumers want; it is a thorough understanding of the product category through consumers' eyes.

The objective is to go beyond the typical conversation regarding the features and functions of today's products and truly understand benefit-oriented "root" wants and needs of an ideal product. Dialog should focus on why consumers want what they do (not merely how they want it). Questioning approaches may include focusing on unfulfilled desires, problems/failures, modifications and desired benefits.

Regardless of the approach, it is important to explore the whole realm of consumer wants and needs ranging from basic → performance → exciter quality (the Kano model of quality).

In today's crowded marketplace, companies that are intimately aware of consumers' wants and needs not only create desirable and satisfying products but also are better positioned to anticipate changes in consumer attitudes that may require tweaks to positioning and/or new product development efforts — for this a close relationship with the consumer is essential. As Scott Bedbury writes in his book, *A Brand New World*: "Almost every brand in existence today can be reduced to the status of a commodity if it fails to effectively evolve both its products and its marketing communications."

Think of root wants and needs as "building permits" — providing consumer-driven checkpoints throughout product development.

Emotional connections

The second of the four cornerstones of concept development is understanding emotional connections. Emotional connections are the relevant link between a product, brand or category and the consumer's life. Understanding emotional connections is often what makes the difference between a product that looks good on the drawing board (but fails on the store shelf) to a product that wins the heart and mind (and pocketbook) of the consumer.

Ultimately, uncovering emotional connections results in an understanding of a consumer's core values related to a product, brand or category. This can be accomplished through the use of a homework assignment and qualitative laddering techniques used to explore specifically how a product, brand or category fits into the consumer's life by investigating chains of relevant connections: images/pictures/words → product/brand/category attributes → associated benefits → personal values.

The study of emotional connections offers a unique perspective on consumers because it is an attempt to determine consumers' value structure as it relates to the brand, product or category. While this may be viewed as too "touchy-feely" by some, it actually provides fodder for a strong and stable positioning strategy because while product features and attributes change frequently, consumer values remain virtually unchanged over time. Further, it takes more than a good product to win the attention of a consumer — the more a positioning or product touches a consumer in a meaningful way, the better its chance to be noticed in today's cluttered marketplace and ultimately gain position in the consumer's consideration set.

Associating emotional connections with our construction example is easy. Think of emotional connections as the consumer's emotional hook that motivates them to sign the building contract for that perfect house they've fallen in love with.

Brand equity

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mantra of the third cornerstone piece of concept development — understanding brand equity. Before a company can develop concepts that reinforce this notion, it must first understand what is both believable and ownable from a brand perspective by exploring the current brand value and associations. By understanding current brand equity (both strengths and weaknesses), companies can create concepts, and hence positioning/products, that coincide with the brand promise.

“Positioning is simply concentrating on an idea — or even a word — that defines the company in the minds of consumers. Having a strong brand identification gives a company an immense edge.” (Jack Trout, *The New Positioning*)

Collecting brand equity information means exploring consumers’ perceptions of what a brand stands for — its current image, its strengths/weaknesses, what’s ownable (and what’s not) and what’s differentiating. Successful concepts should leverage ownable and differentiating brand strengths, as well as counter the brand’s weaknesses.

Successful positioning/product strategy will help maintain and strengthen a brand. The old adage “Jack-of-all-trades, master of none” is applicable to the way consumers think about a company’s expertise. Consumers expect brands to have authority in fairly narrow fields and understanding brand equity prior to developing concepts will help drive positioning/products that are consistent with consumers’ expectations. If a disconnect occurs, the risk is consumer confusion and a message that potentially goes unheard.

Location. Location. Location. Brand equity is like the address where you decide to establish residence — being in the “right” part of town and feeling completely comfortable “living” there.

Competitive landscape

For successful positioning/product strategy, companies should know their competitors as well as they know themselves. This enables the development of concepts that take advantage of competitive vulnerabilities and capitalize on market opportunities. Thus, the final cornerstone piece of concept

development is understanding the competitive landscape.

Due diligence within the competitive landscape arena includes properly defining the competitive set (including logical competitors as well as near-term entrants, substitute products, etc.) and discovering each competitor’s strengths and weaknesses. Competitive intelligence can be accomplished through both primary and secondary research and will provide a current snapshot of the playing field within a category before concepts are developed.

“In today’s hostile market, it is increasingly important not only to be up-to-date with one’s own company, but also to be intimately knowledgeable about one’s competition.” (Jack Trout, *The New Positioning*)

Understanding the competitive landscape will uncover whitespace in the marketplace, logical positioning/product opportunities and (perhaps most importantly) barriers to entry into a category. Since the marketplace is in constant flux, consumer insights relative to the competitive landscape will help to create concepts, and hence positionings/products, that are truly differentiated in the marketplace.

Understanding the competitive landscape is like analyzing the property survey that verifies the market value of your house relative to the market value of other homes in your area. This information allows you to evaluate if you are “living” in the right place.

Buy-in

How many times have you seen a great idea squelched because a key stakeholder did not believe the consumer research information? Have you ever witnessed two stakeholders debating over a concept that you know is not personally relevant to the consumer? Critical roadblocks in the product development process often pop up as a result of disagreement among the key stakeholders. While healthy debate is welcomed in the decision-making process, productivity can be increased if all stakeholders (brand managers, R&D, advertising, marketing research, upper management, etc.) enter concept

development with the same level of consumer understanding. Getting the stakeholders intimately involved in setting the foundation (discovering the four cornerstones) increases buy-in earlier in the product development process and reduces time spent avoiding obstacles further down the road.

Because the researcher is rarely the concept developer, this document may be used by the researcher as a springboard for internal communication or even a translation tool — providing the stakeholders with compelling rationale relative to the importance of the four cornerstone pieces.

Building the foundation


Seem overwhelming? Much of the four cornerstone insights can be accomplished in two to three primary research efforts (category-dependent). Additionally, secondary research can be used as support (and confirmation) to enhance and evolve the learnings.

However, gathering the four cornerstone pieces is only the first step. Synthesizing the information to glean consumer insights and translating the insights into consumer-ready concepts is often the more daunting task. But, at a minimum, knowledge of the four cornerstones instills confidence that consumer-driven concepts are developed.

So, before you begin the concept development process, ask yourself, “Do I have a strong foundation?” If your answer is no, you may be risking the development of a product that is as insubstantial as a house of cards.

Framing it in

Now that the foundation is set, an article in the March issue of *Quirk’s* will provide tactical research methods for use in “framing in” in the concepts. Specific qualitative and quantitative concept evaluation tools will be discussed.

While an entire article could be written on each of the four cornerstone pieces, this article was intended to provide a strategic overview. For additional information on any of the four cornerstone pieces, please feel free to contact the authors. 

Survey Monitor

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Cover and boasts of its many uses. Made of a special fabric that repels sand and water, The Neat Sheet is also designed to stay cool in the hot sun, yet is resistant to most stains and fading. Use it as a bleach blanket, stadium seat, leaf hauler or a painting drop cloth.

Aluminum foil is great for containing the mess when baking sloppy foods like chicken, but sometimes these foods end up stuck to the aluminum foil. That problem may be a thing of the past with Richmond, Va.-based Reynolds Consumer Products' new Reynolds Wrap Release Non-Stick Aluminum Foil. One side of the aluminum foil has a non-stick side so foods just slide off. Release also works well in the freezer, preventing foods from sticking together, so there's no prying frozen foods apart.

Scentco Paint Pourri Scented Paint Additive helps paint smell as good as it looks. New from Thomasville, Ga.-based Scentco, LLC, this colorless product is added to paint and gives off a time-released fragrance for up to a year after application. Use it to freshen up rooms, eliminate odors and create "fragrance moods" throughout the house with scents including Airy Fresh, Wildflower, Ocean Breeze and Soft Vanilla.

As some dog owners know all too well, a dog left home alone all day can sometimes find new ways to have fun such as ripping up the house. Dogs do this because of boredom, anxiety, fear or stress and until now there have been few ways to deal with the problem outside of removing the dog from the house. Phoenix-based Farnam Pet Products has a new solution to the problem with Comfort Zone Canine Behavior Modification Plug-In with D.A.P. This plug-in diffuser continuously releases a "dog appeasing pheromone" that mimics the natural pheromones of a lactating female dog to give dogs a sense of well-being.

Multimedia multitasking

Americans have become well-known for their ability to multitask.

It's not uncommon for people to balance their checkbook while talking on the phone or prepare dinner while helping the kids with homework. A new study by BIGresearch, Worthington, Ohio, and the Retail Advertising and Marketing Association, a division of the National Retail Federation, has found that Americans have begun multitasking in a new arena: media.

According to the Simultaneous Media Usage Study roughly half of consumers engage in simultaneous media usage.

- 59.8 percent of males and 67.2 percent of females watch TV when they go online (all percentages are Regularly plus Occasionally).

- 69.3 percent of males and 76.0 percent of females while online have the TV on.

- 50.7 percent of males and 52.0 percent of females read magazines when they have the radio on.

- 53.4 percent of males and 58.7 percent of females watch TV when they read the newspaper.

- 50.4 percent of males and 60.0 percent of females watch TV when they read magazines.

- 66.7 percent of males and 74.3 percent of females read the newspaper while they have the TV on.

The study was conducted online, with more than 7,800 respondents participating. For more information visit www.bigresearch.com.

Women spending less time on their personal finances

Certified Financial Planner Board of Standards Inc.'s 2002 Consumer Survey of upper-income households shows that on average, women who are primarily responsible for their household's finances spend 3.86 hours a month on those duties, down from 4.96 hours in 1999. Yet 44 percent of the women surveyed said they were satisfied with how they handle their financial affairs, up from 38 percent in 1999.

CFP Board's 2002 Consumer Survey shows that the percentage of women

who consider themselves as their primary financial advisor declined (43 percent vs. 50 percent in 1999) while those who used a financial planner as their primary advisor increased (22 percent vs. 17 percent in 1999). The percentage who have used or currently use a financial planner also increased (42 percent vs. 36 percent in 1999).

The survey showed differences between men and women when comparing attitudes toward financial matters. Women were less likely to feel that they are financially knowledgeable (56 percent vs. 69 percent for men) or more knowledgeable than most of their friends (43 percent vs. 54 percent), and they are less likely to enjoy planning and thinking about financial matters (31 percent vs. 38 percent).

The survey also showed that women are much less likely to use the Internet for financial purposes than men (42 percent vs. 57 percent), and that men access the Internet for a wider array of information than do women.

CFP Board's 2002 Consumer Survey was conducted via written questionnaire from October 23-November 19 and includes responses from 996 households whose income placed them in the top income quartile for the age group of the person completing the survey. The qualifying income level varied depending on the age group. For more information visit www.cfp-board.org.

2003: the year of white tea and citrus?

Chicago-based Mintel offers the following predictions for 2003 from its Global New Products Database.

- Cuisine of the year: Asian.

Easy to prepare and healthy, Asian foods will experience a surge in popularity in 2003. Always flying just under the radar by being available as take-out and at some deli counters, the appeal for Asian-inspired foods will propel mass production by manufacturers. Frozen meals and meal kits (perhaps in the refrigerated section because of the heavy veggie component) will be the

first to show development.

- Look of the year: simplicity.

Clean graphics with minimal print on packs will be what hooks consumers in 2003. And manufacturers won't have to figure how to fit every "low fat, low calorie, you-won't-gain-an-ounce-by-eating-this-product" claim on a package.

- Flavor of the year: citrus.

Nothing new, but getting extremely popular. And everyone needs vitamin C. Runner up: wasabi.

- Scent of the year: vanilla.

This traditional scent is popping up everywhere in skin care, fragrances, and even teas. We'll be seeing more of a good thing.

- Ingredient of the year: White tea.

Green tea was all the rage for the last three years; now it is white tea's turn. It's already appeared in skin care products and, of course, tea. Expect this ingredient, which is chock-full of beneficial antioxidants, to be popping up in vitamins and health care products, hair care, and other food products.

- Kids with mature taste buds.

Children generate billions in business and manufacturers have tuned in. In 2001 we saw "mystery" ketchup colors, blue french fries, and, most recently, green pancake syrup from the Mrs. Butterworth's brand. In essence, products that were already kid-friendly got more so. In 2002, however, we expect to find that kids are going to be the target for products that have been considered only to be appealing to the adult market. For example, coffee. Coffee drinkers are getting younger, and with the growing appeal of ready-to-drink iced coffees and the mammoth spread of Starbucks, Mintel predicts that there will soon be a kid-targeted coffee drink.

- Going the distance. Ten years ago, the newest fad was having your make-up tattooed to your face. It never seemed to catch on, but it did highlight the desire women have for longer-lasting, no-mess cosmetics. We now have long-lasting lipsticks and a three-day wear last tint but the next area up for semi-permanence is fragrances. Potent-but-not-overpowering scents will last until you take them off.

- Beverages crossover. There has

been a surge in amorphous beverage and dairy drinks of late. Is it a soda, a juice, a milk drink, a meal replacement beverage? This trend is primed to burst like a shaken can of soda in 2003. Manufacturers are playing with all sorts of products with niche appeal. Perhaps juice-flavored milk packed with nutrients to replace a meal? A yogurt drink with fizz?

- Puppy love. Are pets people? Expect to see gourmet cat and dog food, perhaps the kind you store in the refrigerator next to your own food, to be mass produced in 2003. We've seen bakery kits that allow owners to make their own doggie bones and premium-priced single-servings of pet food.

- The universal sauce. Spiked ketchup, mixed-up mayo — these seasoned products hit the market in 2002. And with each new product, one wonders when we will find the "universal sauce." Something like a hot and spicy, but mild-mannered sauce that can serve every application and please everyone.

- Downsizing carbs. Manufacturers will be busy reformulating everything they can to be low in carbohydrates. Anheuser-Busch did it with Michelob Ultra and a new reformulation of Doc's Hard Lemonade and now the Atkins diet is getting even more buzz as consumers wonder whether this whole low-fat, low-calorie thing they've been cottoning to for the last 10 years is the right choice. Expect to see the "low carbohydrate" claim push over the "low fat" claim.

- Beverages get hip. 2002 was packed with events and promotions that were geared toward the urban market. Sprite held a Summer Liquid Mix Tour that offered entertainment, fashion, and music. SoBe sponsored the ESPN Rock 'N' Rip tour in early 2002, and we're all familiar with those popular Pepsi commercials and ads. Mintel expects more of a musical tie-in with alcoholic beverages next year, as artists continue to incorporate them into their songs and videos. And with hip-hop mogul Jay-Z recently purchasing a brand of vodka, this prediction will prosper. For more information visit www.mintel.com.

Loyal to loyalty programs

Customer loyalty programs are gaining ground, with 50 percent of all participants in a recent survey stating that they belong to at least one customer rewards program.

The survey of 500 Americans conducted by InsightExpress, a Stamford, Conn., research firm, revealed that loyalty and affiliate programs can be the deciding factor on where people choose to shop, as 56 percent of those who belong say that membership influences their buying behavior.

The survey also found that airlines, which were among the earliest adopters of loyalty programs, have fallen behind credit card loyalty offerings when it comes to customer participation. The table shows the percentages the survey uncovered.

Type of Loyalty Program	Percentage of Customers Participating
Credit Card	27%
Airlines	19%
Restaurant	16%
Hotel	12%
Rental Car	6%

"In a troubled economy, customer loyalty and reward programs clearly make a significant impact on merchants' bottom line, increasing revenue opportunities and improving customer retention," says Lee Smith, president of InsightExpress.

When developing loyalty programs, merchants should focus on the top factors why consumers join loyalty programs to ensure success. These include the benefits of being rewarded for products and services frequently used (54 percent), greater discounts on products and services (49 percent) and special member-only perks (42 percent). For merchants to make their programs most effective, they also need to make the process of joining as convenient as possible by providing multiple sign-up methods. Consumers' most preferred way to join is online (63 percent), followed by in-store (15 percent) and mail (14 percent).

"Loyalty programs have come of age. People are much more willing to

part with personal demographic information if the reward perceived is valuable," says Smith. "Cash-back offers, free products or gifts, and airline miles are the clear winners when it comes to customer rewards."

Not everyone can be enticed to join a loyalty program. The predominant reason respondents cite for not joining is that rewards are perceived to lack any general value (35 percent).

The survey was conducted in mid-December 2002. The data has a tolerance of +/- 4.4 percent. For more information visit www.insightexpress.com or call 203-359-4174.

Consumers too tired to cook or clean

Schaumburg, Ill.-based ACNielsen U.S. reports that half of all heads of household are too tired to put much time or effort into evening meal preparation, and nearly two-thirds are constantly looking for faster ways to do household chores. Such time-pressured sentiments are making convenience-oriented food and

cleaning items some of the fastest-growing consumer packaged goods (CPG) products on the market, according to an ACNielsen Consumer Pre*View survey of consumer attitudes and behaviors.

The research showed that 50 percent of respondents (heads of household age 18+) agreed that: "I am so busy and in such a hurry all day that by dinner I'm too worn out to fix a meal that requires much in the way of time or effort." As the chart shows, those most likely to agree with the statement were younger and had somewhat higher incomes.

Shelf-stable and refrigerated entrees are fully-cooked meals that just need to be heated; boosting sales in the frozen biscuits/rolls/muffins category are products that allow people to select the quantity that they want to heat; pre-moistened cleaning towels have cleaning or polishing ingredients already in them; numerous new product introductions, such as "cereal-with-milk bars," are boosting sales of breakfast bars; and refills for popular electrostatic floor and furniture cleaning products are driving growth in the

polishing/cleaning cloths category. "Several CPG manufacturers are successfully serving today's time-starved consumer," says Phil Lempert, a food industry expert and spokesperson for the ACNielsen Consumer Pre*View service. "However, many retailers are still trying to figure out how to do so. The challenge of providing a freshly prepared great-tasting meal at a reasonable price and with a maximum of convenience has yet to be solved. For those who come up with a good solution, there's tremendous upside potential. I don't see consumers slowing down anytime soon, and meal preparation is a key area where consumers are looking to save time."

The ACNielsen Consumer Pre*View service conducts surveys once a quarter among members of the ACNielsen Homescan consumer panel. The study was conducted in September and October 2002, and included responses from more than 21,500 demographically balanced U.S. households. For more information visit www.acnielsen.com.

"I am so busy and in such a hurry all day that by dinner I'm too worn out to fix a meal that requires much in the way of time or effort."

	Age of Head of Household				Annual Household Income			
Agree	18-34	35-44	45-54	55+	<\$25K	\$25-34,999K	\$35-49,999K	\$50K+
Somewhat/ Strongly	62%	59%	56%	33%	41%	47%	52%	56%

In addition, 63 percent agreed that: "I'm constantly looking for new ways to get the household chores (like shopping, cooking, cleaning) done faster." Younger households were most likely to agree with the statement.

"I'm constantly looking for new ways to get the household chores (like shopping, cooking, cleaning) done faster."

	Age of Head of Household			
Agree	18-34	35-44	45-54	55+
Somewhat/ Strongly	74%	70%	6%	53%

The fast pace of life is translating into success for products that promise to save people time. The chart highlights six fast-growing convenience-oriented product categories.

Category	\$ Volume 52 Weeks Ending November 2, 2002	% Growth vs. Year Ago
Shelf-Stable Entrées	\$207,620,394	+66%
Frozen Biscuits/Rolls/Muffins	\$205,258,598	+56%
Pre-Moistened Cleaning Towels	\$147,400,347	+54%
Breakfast Bars	\$403,528,731	+26%
Refrigerated Entrées	\$1,022,827,039	+20%
Polishing/Cleaning Cloths	\$251,199,784	+16%

Source: ACNielsen Strategic Planner, grocery/drug/mass merchandise (excluding Wal-Mart) channels combined

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of its 2003-2004 council, adding Jacqueline Aglietta, Ann Margreth Hellberg, Siegfried Högl, Clara Origlia, Adam Phillips and Frits Spangenberg. Thus the full composition of the ESOMAR council will be: president: Fredrik Nauckhoff (Switzerland), vice president: José Ignacio Wert (Spain) and council members: Jacqueline Aglietta (France), Gunilla Broadbent (U.S.), Ann Margreth Hellberg (Sweden), Siegfried Högl (Germany), Clara Origlia (Italy), Eugênia Paesani (Brazil), Adam Phillips (U.K.) and Frits Spangenberg (the Netherlands). ESOMAR President John Kelly will remain on the council in an ex-officio capacity for the two-year term of the new council. ESOMAR members also voted to approve all the proposed amendments to the statutes that were put forward in a postal referendum.

Awards

San Francisco research firm **Socratic Technologies** announced that its project analyzing the Web site of Chicago's Northwestern Memorial Hospital won first place in the 2002 EXPLOR Awards. EXPLOR stands for "exemplary performance and leadership in online research" and is presented annually by American Marketing Association. The EXPLOR program recognizes best practices in online research, and the award is based on four main evaluation criteria: organizational relevance, technical execution, creativity, and innovation.

A panel of judges drawn from the research industry, client-side firms and academia selected winners from a field of 16 case studies submitted for the 2002 competition. The winning project, an evaluation of the effectiveness of the Northwestern Memorial Web site, combined qualitative usability research with an online quantitative usability methodology. Both phases were conducted by Socratic's User Experience Group, and used the Socratic Site Diagnostic

(SSD) Internet software application.

Ipsos UK was named market research agency of the year by U.K.-based *Marketing* magazine.

Herndon, Va.-based online survey provider **WebSurveyor Corporation** has been selected as a finalist for the Software & Information Industry Association's 18th annual Codie Awards for Best Software Service.

New accounts/projects

Austin, Texas-based Web survey provider **Inquisite** joined with the Austin Clean Energy (ACE) Initiative to help make Central Texas an economic center for the nation's clean energy industry. Using Inquisite's automated survey software, the ACE Initiative surveyed clean-energy-related enterprises across the United States during the fall of 2002 for a report on the state of the industry.

U.K.-based **BMRB Social Research** has been commissioned to study the implementation of the U.K. Disability Discrimination Act among employers and service providers. BMRB will work in partnership with the Centre for Research in Social Policy, at Loughborough University, on behalf of the Dept for Work and Pensions.

New companies/new divisions/relocations

Los Angeles-based **Datassential Research** and its Menus.com subsidiary have opened an office in Chicago. The new office will focus on food and foodservice-related research.

New York-based **Data Development Corporation** has opened a Chicago office at 4320 Winfield Rd., Suite 200, Warrenville, Ill., 60555. Phone 630-836-8440. The office will be headed by Michele Wojtyna, who has been named a senior vice president.

U.K.-based **Leapfrog Research and Planning** has opened two new

divisions: Leapfrog by Numbers, which will serve as the firm's quantitative arm; and Leapfrog Further, which will handle international research duties.

Doyle Research Associates has moved to 400 N. Michigan Ave., Suite 800, Chicago, Ill., 60611-4148. Phone 312-863-7600. Fax 312-863-7601.

Company earnings reports

Netherlands-based **VNU** announced that, based on current information on second-half developments, it expects an increase of approximately 5 percent in its 2002 cash earnings per share — earnings per share before goodwill charges and extraordinary items — compared with 2001. In its 2002 half-yearly report, released in August, the company forecasted an increase of approximately 3 percent, assuming a USD/EUR parity in the second half of 2002.

A comparison with pro forma 2001 cash earnings per share at constant currencies provides a better insight into the underlying trends of the existing portfolio of activities. Excluding the Consumer Information and Educational Information groups, which were divested last year, and including ACNielsen on a full-year basis (ACNielsen was acquired in February 2001), 2001 pro forma cash earnings per share were EUR 1.67 as disclosed in the 2001 annual report.

Compared with this figure, the company expects its 2002 cash earnings per share to increase by approximately 13 percent, on a constant U.S. dollar exchange rate. In 2002, the average USD/EUR rate is expected to be 1.06, compared with a 2001 average rate of 1.12.

For the full year, the Marketing Information group is expected to show pro forma organic net revenue growth in line with the growth rate of 5 percent in the first half of 2002. Also operating income is expected to advance substantially and full-year operating margin is expected to increase by approximately 1 percent

compared to the pro forma 2001 operating margin. ACNielsen, which accounts for the bulk of the Marketing Information activities, is expected to deliver full-year growth in line with the strong performance it delivered in the first half of 2002, when it posted pro forma organic net revenue growth of around 7 percent.

In the Media Measurement & Information group, pro forma organic net revenue growth for the full year is expected to be somewhat lower than the growth achieved in the first half of 2002. However, the group is expected to deliver substantial growth in oper-

ating income, especially because of continued strong operating performance at Nielsen Media Research in the United States. The full-year operating margin of this group is expected to increase by approximately 1 percent. Nielsen Media Research in the United States expects organic net revenues to increase by approximately 9 percent for the full year. As previously indicated, NetRatings, in which VNU has a majority interest of 65 percent, is expected to reduce its operating loss substantially in the second half of 2002.

The company expects a substantial

improvement in its credit statistics for 2002. Net debt is expected to be in the range of EUR 3.7 to EUR 3.8 billion, versus EUR 4.2 billion at year-end 2001.

During the second half of 2002, VNU made a final arrangement on the divestiture of the Consumer Information group with SanomaWSOY regarding the closing balance sheet per the transaction date (September 30, 2001). This led to a cash outflow of EUR 12 million, which had been provided for in 2001 and therefore has no impact on the consolidated statement of earnings in 2002.

Qualitatively Speaking

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Sometimes the moderator must remove a particular person from the room because his or her influence is so high.

We once had to remove a lawyer from a group because he got off on a tangent saying that to even discuss real estate developments in a focus group on behalf of a residential development client meant the client was violating the law by having the focus group since the group discussion was not preceded by a prospectus.

In a different situation, one of the clients wanted to sit in the group, "as a participant," to get the discussion going in the direction desired. The problem was, any time a participant made a negative comment about her company's product, she felt obligated to defend it. The group was ruined.

Whether or not clients like focus groups is often influenced by their experience observing focus groups. If someone has had a bad focus group (easy enough to do), he may well be biased against them. If that same client has done focus groups and the group participants really liked his new product idea, then he more than likely is a big fan of focus groups because they told him what he wanted to hear. This is one of the real problems in groups: the tendency to interpret conversations from group members in light of the observer's own experience.

Another problem is that the findings are often taken literally. Just because one or two people or an entire group of people say something in a group does not mean you should take their advice. A typical viewer comment would be, "I know it's only one person, but..."

A few years ago a state regulatory authority on apples would not allow their state's apple growers to sell apples with less than a two-inch diameter because they said focus groups told them that apples smaller than two inches were inferior. Such nonsense. Millions of dollars in wasted apples that had to be fed to hogs just because a couple of people in a focus group made such an offhand comment.

You should cringe — and rightly so — when you read, and I read this often, that proposed advertising was "tested" in focus groups and found to be either great or terrible. Commercials should never be "tested" in focus groups because a focus group is not a test. A focus group can provide direction to advertising, but relying upon what a group of people say about advertising in a group where it is cool to say you are not influenced by advertising is foolish.

In doing a focus group on breath mints, one lady was adamant about why she used Certs breath mints. "It's certainly not because of the advertising," she said, very determinedly. It is because (and she held up her arms and touched the forefinger of each hand together) "it's two mints in one."

Never, never, never test commercials in focus groups. Show them if you will for one reason or another, but never refer to this, or use this, as any test of advertising.

Beware of any report on a focus group that reports numbers: three participants said this, two said that. If someone in a 10-member group makes a comment, this cannot be projected to 10 percent of the population. Rather it only indicates the presence of an attitude. Again, focus groups are not projectable. But they are great tools of learning, especially to clients who only hear from their friends, spouses, neighbors or relatives about how great their products or services are. Just knowing how little information most people have on certain products, what they don't know and what they do not care to know is extremely important.

Also beware of any focus group report that reports mean ratings: Attribute A got a mean rating of 5.4, Attribute B a rating of 6.7, etc. There is no statistical validity to the reliability of such meaningless scores, and you should run away from any report that has them.

And beware of wanting to do focus groups because they are "cheap." Conducting focus groups because they cost less than other techniques is using the wrong decision criteria. They may cost less in dollars than other techniques, but the true cost may well be in the cost of incorrect, misleading or wrong information. (4)

Data Use

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- In a choice exercise, respondents were to pick between six or seven products, with the ever-present option of none, at each step. The products included descriptions on a half-dozen or so attributes, each of which varied over several levels (such things as color, size, etc.). What made this interview so tough for respondents was that they were expected to do this choosing 81 times each. Is it any wonder that the results didn't make a lot of sense?

- A conjoint exercise was conducted where respondents were asked to rate each scenario independently of others, i.e., this was not a choice exercise. What made this one so difficult was that each scenario included one level of each of 33 different attributes. Again, there were more than a few anomalies in the results.

- In order to save a buck or two, a client designed and fielded a conjoint study. Only when it came time for the processing of the data was it discovered that two of the attributes were perfectly correlated. For example, if one variable was color, say puce, lilac and mauve, and another was size, say small, smaller and smallest, the design was such that small was always puce, smaller was always lilac and smallest was always mauve. The upshot

of such a design is that one can separate neither the utilities nor their importances for these particular two attributes. (Cue the sound of a toilet flushing research dollars.)

One of the points here is that there are a growing number of sources that will show you how to set up the appropriate experimental design for projects such as these. But as researchers we need to ask ourselves if we should put such unwieldy projects into field without a lot of prior thought. Another point is that inexpensive experimental designs are not always good experimental designs. Penny-wise and pound-foolish would certainly apply here.

Regression analysis abuse

Ordinary least squares regression analysis is a powerful, widely used tool. Everyone learned all about it in statistics 101, right? Well, maybe not quite all. It seems that regression is widely abused, due to some fundamental misunderstandings. So the following list includes both some generalities and specifics.

- Here's something that causes lots of head scratching. When using a forward selection or stepwise procedure for selecting independent variables to go into the final model, once in a while you'll find that nothing is related strongly enough to the dependent variable, say overall rating of the product, to enter the model. Thus, you're

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left with nothing to report. However, what could be happening is that had you forced the variables into the model, the overall relationship might have been statistically significant, even though none of the attributes alone were significant. Doesn't happen often, but sure does happen.

- Short of going through a class in projective geometry, you'll have to accept this one on faith: negative signs on regression coefficients are not "wrong signs" nor are they necessarily intuitive. An attribute may be, all by itself, positively, i.e., have a plus sign for its regression coefficient, related to the criterion (overall rating, remember). Yet when introduced into a model with other variables, the sign may go negative, but still be significant, or may become statistically not significant — in which case the sign is immaterial. The same is true of an attribute that was originally negative. Even more baffling to some is that an attribute that is not significantly related to overall opinion by itself may show up with either a significant positive coefficient or with a significant negative coefficient. As the King said, "It is a puzzlement!" There have been some interesting gyrations as suppliers tried to explain these occurrences to their ultimate clients.

- Speaking (well, writing actually) of gyrations, we've all seen lots of manipulations performed to allocate percentage of variance attributable to each independent variable in a multiple regression model. It's tough to do because the so-called independent variables aren't truly statistically independent. Thus, there's no really good clean way to do this allocation; shared variance caused by multi-collinearity is the problem and, yeah, it makes life tough for some of us in cases like this.

- Here's one from the archives, which is included here since correlation is so intimately related to regression. A series of yes-no answers were coded twice; the first was Yes=1 and No=0 and the second was just the opposite. Then correlation coefficients were generated between the two sets of recodes. Duh!

- In another instance, the task was to estimate the relationship between price charged and quantity demanded, a la basic Economics 102. So data were collected asking respondents how many they would purchase at various prices. Then, for some unknown reason, price was selected as the independent variable and quantity the dependent in the regression equation. Out pops the resulting simple regression equation, which was immediately recognized as the wrong one. But, instead of rerunning the analysis correctly, the analyst fell back on basic algebra and solved for quantity as a function of price. Intuitively O.K., but really a major blunder.

As noted, regression analysis is very widely used in marketing research studies. It's our friend and, of course, everyone understands all of the subtleties and nuances, right? Well, probably not. So tread very carefully with

even these innocuous-seeming analyses.

Missing data/item non-response abuse

Much as we'd like to believe otherwise, our customers really can't evaluate all of the dimensions of all products or services that you may want to query them about. So it's sometimes OK for someone to respond with a, "Gee, I really don't know what score I'd give to _____ because I don't use that part of the product." A personal example, if you please. I always use the drive-through window of a particular branch bank. If I'm participating in a survey about that branch and you ask me anything about inside service, I'd have to say, "Beats me." I can respond to branch convenience, hours, drive-through efficiency and a myriad other things but not to everything. So, in a sense, no answer is an answer. Let's look at some interesting ways of handling missing data.

- As sometimes happens, there will be a respondent or two or 10 who won't answer anything at all. In one particular study, the task was to factor analyze the answers to a series of 50 questions. The project director decided to substitute the means of all respondents who did answer a given question for corresponding missing data — a common but not necessarily the best solution to item non-response. The two respondents who answered none of the 50 items were also included because the project director wanted her client to get results for the entire sample, not for two fewer than the entire sample.

- Here's one I love! Data coders put favorable response codes for missing answers in a series of open-ended "What did you think about..." questions.

- This is difficult to explain, so please be patient. A questionnaire was to include 120 scale items for a factor analysis. The research director recognized that this might be a bit of a stretch for respondents, and so he broke the task into four chunks using four independent cells. Cell #1 was to rate statements one through 30, cell #2 handled 31 through 60 and so on. No overlap in the questions from cell to cell. So essentially, each question had 75 percent missing answers as a minimum. How to do the factor analysis? Easy. Just use the mean substitution option available on most computer programs. Thus, for each statement, at least 75 percent of the answers were a constant value. This does verrrry interesting things to the resulting correlation matrix whence factors are extracted.

- In this example, the missing data were intentional. Respondents were each assigned to one of three independent cells. Cell #1 tested product A versus product B, gave a series of diagnostics and an overall preference measure. Cell #2 did the same with product C versus product D and, you guessed it, cell #3 compared product E with product F. Of course, through data analysis magic, the final report showed all six products ranked on all of the diagnostic scales as well as overall prefer-

ence. This worries me a great deal!

- Maybe there should be missing data when there apparently are none. In one study, 200+ respondents were to rank 32 concepts by preference. Not a single respondent had a single missing data field. Sure raises a red flag, but it might have been legitimate.

As y'all know, there are a variety of ways to handle missing data/item non-response. The ones above are some of the more inventive that I've ever seen. The last one leads into the next section.

Online interview abuse

What, you thought Bill Gates' minions were gonna get off unscathed? No way. Online interviewing may still be a relative infant in marketing research data collection, but still the following did occur:

- A study was conducted in several different countries using identical data collection instruments. The final sample sizes were roughly equal, several hundred respondents each. Holding a couple of countries aside for the moment, the number of questions answered by individual respondents ranged from a low of 24 percent to a high of 100 percent. Most, but not all, questions had at least a few no-answers as well with the highest showing 50 percent non-response for one particular country. So far, then, the data were typical and about like expected (I can't evaluate an ATM if I don't use ATMs). In two countries, respondents were "forced" (I don't think that bamboo splinters were introduced under the fingernails, but something was done) to answer all questions. I find this feature of online interviewing onerous but in many other studies respondents were and are forced to answer everything. Data comparability between these countries is especially bothersome to me for studies like this. (As an aside, we did learn a lot about how native culture influences scale usage.)

- There was an extremely long list of concepts for respondents to evaluate on a 7-point scale. Typical respondents found it easier to give constant answers down the entire list, rather than thoughtfully discriminate between them. The project director decided to eliminate anyone from the analysis who gave constant answers to the entire slate. Of course, that dropped anyone who really felt that each concept was worthy of a 5, say.

- A food-item study was administered to female heads of household since they were seen to be the primary grocery shopper. A telephone follow-up was done to verify that the respondent was actually the FHH. Somewhere around 50 percent of purported respondents claimed that they didn't even know about the study. Seems that another member of the household, generally a teenage child, was using the computer with mom's Internet account.


- Analyzing data from one particular online survey

showed that income was inversely related to age — the 18-24-year-olds were more likely to be in the \$100,000+ category than in any other. Whoa, what happened? The survey designers used radio buttons for respondents to indicate their response to a given item. But, they thoughtfully filled in the first button, so to enter a response different from the first, a respondent had to click on another response. Obviously now, the 18-24 button was first for age, so if you didn't want to reveal your age you were assigned the pre-existing 18-24 answer. Same deal with income, only for who knows what reason, the highest income of \$100,000+ was listed first. So again, if you didn't tell your income you got stuck into the highest bracket. As long as the IRS doesn't find out, you're O.K. but the survey results were sure out of whack!

Be skeptical

Be skeptical and don't hesitate ask lots of questions of everyone involved in the project. Beware of black box approaches wherein you don't get to peek inside the box. Be intuitive — we generally have a fair-to-middlin' idea of what the study will yield. Sure, we'll see minor surprises but major, earth-shattering shocks are still pretty rare in our business. My guess is that most of you have seen many similar abuses and are working hard to remedy the situations that cause them. Certainly, really digging into the data helps. Don't think that the canned statistical analysis computer packages can do your thinking for you. But don't go to the other extreme — one project director used the independent samples t-test rather than the correct dependent samples t-test because he felt that SPSS was wrong in its computations for the latter.

Oh yeah, just one more thing (with apologies to Lt. Colombo)

Like most, if not all of you, I couldn't function without my computers. I use them day in and day out. (In fact, my wife accused me of loving my computers more than I do her. While not disagreeing, I said, "Yeah, but I love you more than I do the printer.") Anyway, the term is "discriminant analysis" not "discriminate analysis." There are a lot of people who have spent a lot of money on a lot of research projects/reports/presentations who routinely accept the latter term, even though it's not the correct one. Why is that, you sagely ask? My guess is that computer spell checkers don't recognize "discriminant" and suggest "discriminate" as an alternative, exactly as the one I'm using does. The researcher who accepts the proposed substitution can be left with egg on his face if he's making a presentation to an enlightened audience. Be careful out there; just because you're paranoid doesn't mean that they're not out to get you. 

Software Review

continued from p. 20

just too many additional steps to seeing what it will really look like for my liking.

A separate tool called the BVC editor is used to assign Web templates, change the appearance of buttons and give the overall look and feel. Here things get a bit more technical.

The good news is you can do almost anything from this tool — it offers real flexibility for any Web-savvy programmer. The bad thing is that the links between Visual QSL and BVC are, at times, tenuous. For example, if you add images, such as product packages, or logos when designing your survey in Visual QSL, you need to list them again here to resolve the file references. Get out of step, and you could unwittingly be showing your respondents the wrong pictures. Just imagine what that would do to your results! If you were already using some randomization

in the display, it is the kind of error that could be impossible to catch. Another constraint is in the area of so-called “grids” used to put several questions on one screen. Despite some recent improvements, you still need a combination of patience and good fortune to succeed.

Survey deployment, which can be painful in some server-based packages, is a pushover here. A one-click operation creates a “survey package,” which is a single file you can upload either to Pulse Train’s Web bureau server or to your own.

After this, you control the survey by logging into a Web portal, rather bafflingly called the IMK (Internet management kit). The software as a whole suffers from being rather heavy on geek-speak, which is a shame for something that has successfully migrated from being a back-office tool to something client service people will want to use for themselves. And even if you discover what the letters stand for, you are

often no wiser as to their meaning.

The IMK provides a very easy way of finishing off the definition of the project, launching it and managing it once it is active. Sampling, quota controls and more are controlled from the IMK easily and efficiently. Bellview Web does not provide a panel management solution, but has all the right hooks and an open SQL server database underneath to make integration easy. The IMK also contains wonderfully clear

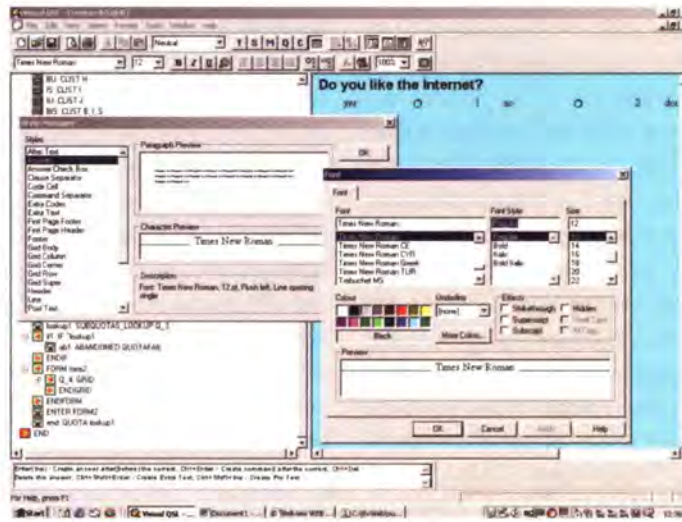
Segelstrom received two days of training in Bellview Web, and from then on has been able to handle every project that has come her way. She reports: “We find [Bellview Web] has a lot of capabilities that the previous software we used did not have. It is easier to use and it has more abilities to do different things.”

Commenting on the level of technical knowledge required to get the job done, Segelstrom considered it an advantage to have some insight. “If you happen to know a little bit of HTML and have just a little bit of programming knowledge, that helps immensely. For example, it helps you to make your survey look prettier. But even that is not strictly necessary — it really could not be easier to do what you want to do in terms of the appearance.”

For her, the ability to look behind the GUI and see the code has been another benefit, as she is increasingly writing QSL code directly, when it saves time or gives her more control. “Now I can do it either way, but certainly in the beginning I used the visual editor almost exclusively. It would have been a real learning curve if it had just been the QSL language.”

As for the bigger picture, Segelstrom is convinced that the control this tool brings to GMT is having a positive impact on both the service to clients and the bottom line. “Doing these surveys on the Web is so much easier, and more cost-productive. We get a much better response. I think it shows people would much rather take a survey on the Internet,” she says.

Through you can use the same survey design tool to build Web, CATI and paper-based surveys, the results databases are still separate. But connectivity is coming with an umbrella product called Bellview Fusion, which is due for release this year. In the meantime, despite some minor technical inconveniences, this is an intelligent Web interviewing solution that has a lot to offer for everyone, especially the power user. *[E]*



Bellview Web surveys can be designed in QSL, a traditional “spec” language, or by using the graphical design tool Visual QSL.

statistics, so you can easily audit the progress of surveys as well as the number of completes and average times spent at each question.

General Management Technologies is a management consulting company based in Pittsburgh with its own research division. In the past, surveys of customers or employees to support various consulting projects had been carried out on the telephone or even face-to-face. Moving to Internet surveys using Bellview Web has allowed the company to carry out much more of its research for itself. Denise Segelstrom, research associate at GMT, has found that this piece of survey software from Pulse Train fits in well with a range of software from other suppliers. Results are passed over to SPSS or Wincross for analysis, and where a conjoint exercise needs to be incorporated into a study, the Bellview Web survey is simply linked to another stage created using Sawtooth’s Web-based conjoint product.

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DIY

continued from p. 23

have encountered at least three instances within large, well-run companies of “underground research” being conducted by the most unsuspected departments. These departments, some of which are far removed from day-to-day client contact, are purchasing (or subscribing to) online survey systems and doing research completely without external “interference.”

This leads to several observations about the success of the DIY software in competing with the internal research department.

First, managers are reporting that they are “delighted” with the fact that they can quickly and cheaply collect thousands of interviews on issues that are of importance to them. The staff members who are doing the work report high levels of satisfaction with the ease-of-use and ease-of-learning of several of the more commonly mentioned systems. A majority agrees that the output is “very valuable” and is being used both to support large-budget spending proposals and to take corrective actions based on “customer feedback.”

On the face of it, it would seem like the democratization of research is working to everyone’s delight and satisfaction. That is, until one takes a closer look at the actual output being produced.

Unfortunately, there is a reason why good research takes longer and costs more than quick-and-dirty studies. The first reason can be summed up by the old computing adage: “Garbage in, garbage out.” In the several cases that I’ve examined, basic research design errors were plainly evident ranging from leading and biased question construction to the use of very poor option sets and/or unbalanced scales.

One of these mini surveys dealt with customer satisfaction issues and

began with a four-paragraph statement on how hard all the people were trying to do a “great job at meeting every challenge” and that “all of your comments will be reviewed by the people who are trying to make a difference for you!” The choices one could choose to indicate overall satisfaction were as follows:

Extremely Satisfied
Very Satisfied
Satisfied
Somewhat Satisfied
Not Satisfied

The second reason why the success of DIY research may be less beneficial to the company as a whole is the impact of poor research on the public’s impression of the brand. How would it be if someone in the company shipping department decided to run cheap ads that they drew themselves without clearing it with the company’s marketing and communications department? The same type of negative brand-impact occurs when customers get poorly-worded, obviously amateurish surveys delivered through a third-party hosting service with names like Survey Monkey. No offense to Survey Monkey, but it’s just not a name that infuses confidence or resonates well with Fortune 500 brands.


Sampling is of course a major issue even with the most buttoned-up research, but the DIY process promotes quantity as the cure-all for sampling issues. Many allow you to send out thousands and thousands of invitations with no cost implication. The most obvious problem with this scheme is that there are no sampling controls at all. In the several instances I’ve observed, “someone just got a customer list” and sent out as many invites as they had e-mail addresses. Others mentioned buying e-mail lists for “hardly any money at all.” Leaving aside for a moment that the character of the respondents was

no doubt questionable, the larger issue, in my opinion, is that they spammed their lists. Nothing endangers a company’s reputation with its constituent public’s heart more than sending spam e-mail and multiple reminders. This point alone should be enough to cause companies to limit or closely control this form of activity.

Finally, and probably most problematic, is that the results from these DIY surveys are being used as justification for rather important decisions. Beyond the obvious problems with the questions themselves, the analytical interpretations of the outcomes are also questionable. And like many “facts,” once research is quoted, no matter how poorly done, it can quickly become accepted as gospel.

Address the issues

Just because there are problems with DIY research and the way it is being misused, that does not spare the professional researcher from the competition’s compelling message. It is not enough to simply show errors in the implementation or to point out the negative impressions being created. The industry professionals must address the time-and-money issues that make DIY an attractive alternative in the first place. Maybe the answer is to provide more education for people who really, really want to do these tasks themselves. Another avenue might be to offer quick reviews of draft questionnaires before they are approved for public release. A third option might be to limit the use of customer e-mail addresses as a sample source without prerequisite review.

But whatever the solution, professional research managers might find it in their own best interests to do a little “research on the state of research” and determine the degree to which DIY systems are providing debatable power to the people. 

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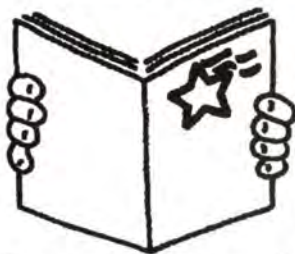
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The Directory of Data Processing and Statistical Analysis begins on page 76.
The cross-reference of data processing services begins on page 94.

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 imyst, inc.
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 Inquire Market Research, Inc.
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 Insight Research, Inc.
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 JRP Marketing Research Services
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 KG Tabs, Inc.
 KPC Research
 Kudos Research
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 Lein/Spiegelhoff, Inc.
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 Mangen Research Associates, Inc.
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 Market Trends Pacific, Inc.
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 MMR Research
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 Research Data, Inc.
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2003 Directory of Marketing Research Software



The 2003 Directory of Marketing Research Software was compiled by sending listing forms to companies we identified as producers/vendors of marketing research-related software. This year's directory lists over 130 firms and over 350 software titles. The software firms are arranged alphabetically. Along with the company's vital information, we've also included the title(s) of the software they sell.

To make finding software easier, we have added cross-reference tables grouping the various software packages by capability (tabulation, integrated interviewing, CAPI/CASI, CATI, Web interviewing, paper-based survey software, and miscellaneous). The tables show a list of each product's features and capabilities, allowing you to compare and contrast several products at a glance. Once you locate a package that interests you, simply refer to the company's listing in the alphabetical section for more information.

The company alphabetic section begins on page 102.
The software cross-reference tables begin on page 120.

Able Software Corp.
5 Appletree Ln.
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Ph. 781-862-2804
Fax 781-862-2640
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Software:
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(See advertisement on p. 102)

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(See advertisement on p. 100)

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(See advertisement on p. 103)

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(See advertisement on p. 10)

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(See advertisement on p. 105)

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(See advertisement on p. 107)

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(See advertisement on p. 19)

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(See advertisement on p. 109)



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(See advertisement on p. 3)

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(See advertisement on p. 99)

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(See advertisement on p. 13)

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(See advertisement on p. 3, 111)

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(See advertisement on p. 85)

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(See advertisement on p. 89)

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(See advertisement on p. 111)

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(See advertisement on p. 113)

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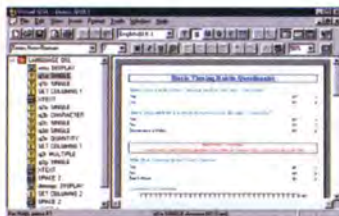
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Hosted Survey Hostedware, p. 108					●	Both	Unltd.	Unltd.	●	●	●	●	●	●	●	●	Either	
Idea Smart CAMO, p. 104					●	GUI	Unltd.	Unltd.	●		●		●		●			
ImagEntry Viking Software Solutions, p. 118	●		●	●		GUI	32,000	32,000									Buy	\$\$

\$ = \$0-\$500

\$\$ = \$501-\$1500

\$\$\$ = \$1501-\$2500

\$\$\$\$ = \$2500+

Tabulation Software Software Title/ Company/Listing page#	Operating System					Tabulation Features							Significance Tests				Purchasing	
	Win	Mac	Unix	Linux	Web	Graphic user Interface (GUI) or script	Maximum Variables	Maximum Tables	Filtering	Weighting	Visual Tools	HTML Output	Chi-Square	F-Test	T-Test	Z-Test	Buy or Lease	Price Range
InsightExpress InsightExpress, LLC, p. 108					●	Both	Unltd.	Unltd.	●	●	●	●	●	●			Lease	
InsightPanels InsightExpress, LLC, p. 108					●	Both	Unltd.	Unltd.	●	●	●	●	●	●			Lease	
InterACT Unified Dialog AB, p. 118	●				●	GUI	>1000		●								Either	
Interview & Analysis Program Comstat Research Corporation, p. 104																		
IoSphere Xorbix Technologies, Inc., p. 119	●	●			●	GUI	Unltd.	Unltd.	●		●						Either	
Maritz Stats Maritz Research, p. 108	●					GUI							●	●	●			
Market Sizzle CAMO, p. 104					●	Both	Unltd.	Unltd.	●	●	●	●	●	●	●			
MARS™ Salford Systems, p. 113	●		●	●			8,192		●	●	●						Buy	\$\$\$\$
MENTOR Computers for Marketing Corp. (CfMC), p. 104	●		●	●		Syntax	Unltd.	Unltd.	●	●	●	●	●	●				
MERLIN Tabulation System DATAN, Inc., p. 105	●		●	●		Syntax	32,000	100,000	●	●		●	●	●	●		Lease	\$\$\$
MERLINPlus (plus menus) DATAN, Inc., p. 105	●		●	●		Syntax	32,000	100,000	●	●		●	●	●	●		Lease	\$\$
Microtab XP 2003 - Ad-On Module Microtab, Inc., p. 110	●					GUI	Unltd.	Unltd.	●	●		●	●	●	●		Buy	\$\$
Microtab XP 2003 - Professional Edition Microtab, Inc., p. 110	●					GUI	Unltd.	Unltd.	●	●		●	●	●	●		Buy	\$\$\$
Microtab XP 2003 - Standard Edition Microtab, Inc., p. 110	●					GUI	Unltd.	Unltd.	●								Buy	\$\$
MR Tables SPSS MR USA, p. 115	●					GUI				●		●	●				Buy	
NCSS NCSS, p. 110	●					GUI	1,000	Unltd.	●		●	●	●	●			Buy	\$
NCSS Dataxiom Software, Inc., p. 105	●					GUI	250	Var.	●	●	●	●	●	●				
NET-MR Tabulation Global Market Insite, Inc., p. 108	●		●	●	●	GUI	Unltd.	Unltd.	●	●	●	●	●	●				
NIPO DIANA NIPO Software, p. 110	●					Both	Unltd.	Unltd.	●	●		●	●	●	●		Lease	\$\$\$
Onceover™ Data Cleaning Data Vision Research, Inc., p. 105	●					Syntax		11,500	●	●							Buy	\$\$
OSCAR™ DataUSA, Inc., p. 105	●		●	●													Lease	
PEER Forecaster Delphus, Inc., p. 106	●					GUI			●				●	●			Buy	\$
Production Sizzle CAMO, p. 104					●	GUI	Unltd.	Unltd.	●	●	●	●	●	●	●			
P-STAT® P-STAT, Inc., p. 112	●		●	●		Both	250,000	Unltd.	●	●		●	●	●			Buy	\$\$

\$ = \$0-\$500

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Tabulation Software	Operating System					Tabulation Features							Significance Tests				Purchasing	
	Win	Mac	Unix	Linux	Web	Graphic user interface (GUI) or script	Maximum Variables	Maximum Tables	Filtering	Weighting	Visual Tools	HTML Output	Chi-Square	F-Test	T-Test	Z-Test	Buy or Lease	Price Range
Pulsar Pulse Train Ltd., p. 112	●					GUI	Unltd.	Unltd.	●	●	●						Either	
QDA® Data Analysis Software Tragon, p. 118	●					GUI	100				●		●				Buy	\$\$\$\$
QPSMR INSIGHT QPSMR Limited, p. 112	●					Both	30,000	30,000	●	●			●	●	●	●	Lease	\$\$
QPSMR REFLECT QPSMR Limited, p. 112	●					Both	30,000	30,000	●	●			●	●	●		Buy	\$
QPSMR SOLO QPSMR Limited, p. 112	●					GUI	30,000	30,000	●				●	●	●		Buy	\$\$
QTAB Jan Werner Data Processing, p. 119	●			●		Syntax	Unltd.	Unltd.	●	●			●	●	●	●	Either	\$\$\$
Quantum SPSS MR USA, p. 115							Unltd.	Unltd.	●	●			●		●	●	Buy	
Quanvert SPSS MR USA, p. 115	●					GUI		Var.	●	●					●		Buy	
Quik-Poll Touch Base Computing, p. 118	●					GUI	300		●	●	●		●					
QWRITERII for Windows Your Perceptions, p. 119	●					GUI	2,000	200			●						Buy	\$
Raosoft EZReport Raosoft, Inc., p. 113	●					GUI	Unltd.	Unltd.	●	●	●		●	●	●		Buy	\$
SatisfactionExpress InsightExpress, LLC, p. 108					●	Both	Unltd.	Unltd.	●	●	●	●	●	●			Lease	\$\$\$\$
SNAP® Professional Mercator Corporation, p. 109	●					GUI			●	●	●		●		●		Buy	
SNAP® Results Mercator Corporation, p. 109	●					Both	Unltd.	Unltd.	●	●	●		●		●			
SNAP® Scanning Mercator Corporation, p. 109	●										●				●		Buy	
SPSS SPSS MR USA, p. 115	●	●	●		●	Both	Unltd.	Unltd.	●	●	●		●	●	●	●	Buy	
Star Pulse Train Ltd., p. 112	●					Both	Unltd.	Unltd.	●	●					●	●	Either	
STAT XP VOXCO, p. 118	●					Syntax	10,000	32,000	●	●	●		●		●	●		
STATBEANS StatPoint, LLC, p. 115	●	●	●	●		Syntax	Unltd.	Unltd.	●	●	●		●	●	●	●		
StatCheck™ Stat Checking Data Vision Research, Inc., p. 105																●	Buy	\$
Statgraphics Plus StatPoint, LLC, p. 115	●					GUI	Unltd.	Unltd.	●	●	●		●	●	●	●		
STATISTICA Enterprise-Wide StatSoft, Inc., p. 116	●				●	Both	Var.	Var.	●	●	●		●	●	●	●	Buy	
STATLETS StatPoint, LLC, p. 115					●	GUI	Unltd.	Unltd.	●	●	●		●	●	●			
StatMost Dataxiom Software, Inc., p. 105	●					GUI	250	Var.	●		●		●	●	●	●		

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Tabulation Software	Operating System					Tabulation Features							Significance Tests				Purchasing	
	Win	Mac	Unix	Linux	Web	Graphic user interface (GUI) or script	Maximum Variables	Maximum Tables	Filtering	Weighting	Visual Tools	HTML Output	Chi-Square	F-Test	T-Test	Z-Test	Buy or Lease	Price Range
StatPac for Windows StatPac, Inc., p. 115	●					Syntax	1,000	Unltd.	●	●	●		●	●	●	●	Buy	\$\$
STATS™ Decision Analyst, Inc., p. 106	●					GUI				●			●					
SumQuest SumQuest Survey Software, p. 116	●					GUI	250	Unltd.	●	●	●	●	●				Buy	\$
The Survey Cybernetic Solutions - The Survey Software, p. 105	●					GUI	1,000	32,000	●	●	●		●	●	●	●	Buy	\$
Survey Explorer Memphis International, p. 109	●					GUI	Unltd.	Unltd.	●	●			●					
Survey Select Expert SurveyConnect, Inc., p. 116	●					GUI	Unltd.	Unltd.			●						Buy	\$\$
Survey Stats Drago Consulting Inc., p. 106																		
The Survey System Creative Research Systems, p. 104	●					GUI	32,000	5,000	●	●			●	●	●	●	Buy	\$
Survey Viewer Memphis International, p. 109	●					GUI	Unltd.		●	●	●		●					
SurveyPro Apian Software, p. 103	●					GUI	3,000	3,000	●	●	●	●	●				Buy	\$\$
SurveySolutions Perseus Development Corporation, p. 112	●					GUI	Unltd.	Unltd.	●		●							
Sysurvey.com SySurvey, p. 118					●	GUI			●		●	●					Lease	
TPL Tables QQQ Software, Inc., p. 112	●		●			Both	Unltd.	Unltd.	●	●		●					Buy	\$\$
TreeNet Salford Systems, p. 113	●		●	●		Both	200,000		●	●	●						Buy	\$\$\$\$
TRIC TRAC® Software Innovation TricTrac A/S, p. 115	●					GUI	Unltd.	Unltd.	●	●								
Turbo Spring-Stat Spring Systems, p. 115	●										●		●	●	●	●	Buy	\$
UNCLE Professional The Uncle Group, Inc., p. 118	●					Both	65,534	9999	●	●	●		●		●		Buy	\$\$\$\$
UNCLE Standard The Uncle Group, Inc., p. 118	●					Both			●	●	●		●		●		Buy	\$\$\$\$
The Unscrambler CAMO, p. 104	●					GUI	Unltd.	Unltd.	●	●	●			●	●	●		
U-Tab Weeks Computing Services, p. 118	●					GUI	Unltd.	Unltd.	●	●	●	●			●		Buy	\$
VDE Viking Software Solutions, p. 118	●		●	●		GUI	32,000	32,000									Either	\$\$
VDE+Images Viking Software Solutions, p. 118	●		●	●		GUI	32,000	32,000									Buy	\$\$
Vector ATP Limited, p. 103					●	GUI	Unltd.	Unltd.	●	●	●	●					Lease	\$\$\$\$
WesVar Westat, p. 119	●					GUI	Unltd.	Unltd.		●			●	●	●	●	Buy	\$
WinCross™ The Analytical Group, Inc., p. 102	●					Both	Unltd.	Unltd.	●	●	●	●	●	●	●	●	Buy	\$\$\$
XPro Dataxiom Software, Inc., p. 105	●					GUI	250	Var.	●	●	●		●	●	●	●		

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Integrated Interviewing Software Software Title/ Company/Listing page#	Operating System					Design Tool Graphic user Interface (GUI) or script	Types of Data Collection						Features			Purchasing		
	Win	Mac	Unix	Linux	Web		CAPI	CASI	CATI	Web	E-Mail	Paper	Scanning	Keyed Entry	Tabulation	Statistics	Visual Tools	Buy or Lease	Price Range
ARCS SPSS MR USA, p. 115	.					GUI			.	.							Buy	
AskAnywhere Senecio Software, Inc., p. 114		GUI	.	.	.									
Askia ASKIA, p. 103			
C-Gen - Customer Survey Generator William Steinberg Consultants, Inc., p. 116	.					GUI			.	.	.	.	.	.	.	.	Buy	\$
Ci3 System Sawtooth Software, Inc., p. 114	.					Both	.	.					.	.			Buy	\$
Confirmit FIRM INC., p. 106					.	GUI	.	.	.	.	.	.	.	.	.	.
Dub InterViewer NEBU b.v., p. 110					.	GUI	.	.	.	.			.	.			Lease	
Eform Beach Tech Corporation, p. 104	.				.	Both			.	.	.	.	.	.	.	.	Either	
Hosted Survey Hostedware, p. 108					.	Both	.		.	.	.	.	.	.	.	.	Either	
InterACT Unified Dialog AB, p. 118	.				.	GUI	.		.	.	.	.	.	.	.	.	Either	
Interviewer Suite VOXCO, p. 118	.				.	Both	.	.	.	.			.	.
IT CATI/CAPI/Web Interview Technology, p. 108											
NET-MR Suite Global Market Insite, Inc., p. 108	GUI	.	.	.	.	.	.	.	.	.	.
NIPO Interview System NIPO Software, p. 110	.					Both	.	.	.	.			.	.			Lease	\$\$
QPSMR CATI QPSMR Limited, p. 112	.					Both	.	.	.	.	.	.	.	.	.	.
Quanquest SPSS MR USA, p. 115	.					GUI	.		.	.	.	.	.				Buy	
Raosoft SurveyWin Raosoft, Inc., p. 113	.					GUI	.	.	.	.	.	.	.	.	.	.	Buy	\$
Results for Research 6.0 RONIN Corporation, p. 113	.				.	Both	.	.	.	.							Buy	
SNAP® Professional Mercator Corporation, p. 109	.					GUI	.	.	.	.	.	.	.	.	.	.	Buy	
SSI Web Sawtooth Software, Inc., p. 114	.				.	Both	.	.	.				.	.			Buy	\$\$\$\$
StatPac for Windows StatPac, Inc., p. 115	.					Syntax			.	.	.	.	.	.	.	.	Buy	\$\$
SumQuest SumQuest Survey Software, p. 116	.					GUI			.	.	.	.	.	.	.	.	Buy	\$
The Survey Cybernetic Solutions - The Survey Software, p. 105	.					GUI			.	.	.	.	.	.	.	.	Buy	\$
Survey Genie William Steinberg Consultants, Inc., p. 116	.					GUI			.	.	.	.	.	.	.	.	Buy	\$
Survey Said for the Web Marketing Masters, p. 108		GUI			.	.	.	.	.	.	.	.	Buy	\$\$
Survey Said for Windows Marketing Masters, p. 108	.					GUI			.	.	.	.	.	.	.	.	Buy	
The Survey System Creative Research Systems, p. 104	.					GUI	.	.	.	.	.	.	.	.	.	.	Buy	\$
SurveyPro Apian Software, p. 103	.					GUI	.	.	.	.	.	.	.	.	.	.	Buy	\$\$
SurveySolutions Perseus Development Corporation, p. 112	.					GUI			.	.	.	.	.	.	.	.
TeleSage Software Suite TeleSage, Inc., p. 118	.					GUI	Buy	\$\$\$
TRIC TRAC® Software Innovation TricTrac A/S, p. 115	.					GUI		

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\$\$ = \$501-\$1500

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\$\$\$\$ = \$2500+

CAPI/CASI Software Software Title/ Company/Listing page#	Operating System					Platform				Design Tool	CAPI/CASI Features				Purchasing	
	Win	Mac	Unix	Linux	Web	Desktop	Handheld	Touchscreen	IVR	Graphic user Interface (GUI) or script	Audio	Still Images	Video	Tabulation Analysis Tools	Buy or Lease	Price Range
Abase Advanced Data Research, Inc., p. 102	●					●	●	●		Both	●	●	●	Yes	Buy	\$\$\$\$
ACA System Sawtooth Software, Inc., p. 114	●					●				GUI	●	●	●	Yes	Buy	\$\$\$
ARCS™ IVR/Web DBM Associates, p. 105	●				●				●	GUI	●			No		
Askia Face ASKIA, p. 103	●					●				Both	●	●	●			
Bellview CAPI Pulse Train Ltd., p. 112	●					●				Both	●	●	●	Add-on	Either	
Blaise Westat, p. 119																
CBC System Sawtooth Software, Inc., p. 114	●					●				GUI	●	●	●	Yes	Buy	\$\$\$\$
Ci3 Sawtooth Technologies, Inc., p. 114	●					●		●		Syntax	●	●		No	Buy	\$\$\$
Ci3 System Sawtooth Software, Inc., p. 114					●	●				Both	●	●	●	Yes	Buy	\$
CONVERSO CAPI CONVERSOFT (Axiom Software), p. 104																
CONVERSO CASI CONVERSOFT (Axiom Software), p. 104																
CVA System Sawtooth Software, Inc., p. 114	●					●				GUI	●	●	●	Yes	Buy	\$\$
DialQuest TeleSage, Inc., p. 118	●								●	GUI	●			Add-on	Buy	\$\$\$
Dub InterViewer NEBU b.v., p. 110					●	●	●	●		GUI	●	●	●	Add-on	Lease	
Eform Beach Tech Corporation, p. 104	●				●	●			●	Both	●	●		Yes	Either	
Entryware SPSS MR USA, p. 115							●			GUI				Add-on	Buy	
Entryware™ Techneos Systems Inc., p. 118	●							●		Both				No	Lease	\$\$
eSurveyor 3.1 Domino Halogen Software Inc., p. 108																
eSurveyor 3.2 Open Halogen Software Inc., p. 108																
Hosted Survey Hostedware, p. 108					●	●	●			Both	●	●	●	Add-on	Either	
Hyper Q IVR Research.Net, Inc., p. 113									●							
IdeaMap® Wizard™ Moskowitz Jacobs Inc., p. 110	●					●				GUI	●	●	●	Yes		
IdeaMap®.Net Moskowitz Jacobs Inc., p. 110					●	●				GUI	●	●	●	Yes	Lease	\$\$
Inet Q Online Research.Net, Inc., p. 113															Either	

\$ = \$0-\$500

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\$\$\$\$ = \$2500+

CAPI/CASI Software	Operating System					Platform				Design Tool Graphic user Interface (GUI) or script	CAPI/CASI Features			Purchasing	
	Win	Mac	Unix	Linux	Web	Desktop	Handheld	Touchscreen	IVR		Audio	Still Images	Video	Tabulation Analysis Tools	Buy or Lease	Price Range
InterACT Unified Dialog AB, p. 118	●					●							Yes	Either	
Interview & Analysis Program Comstat Research Corporation, p. 104															
Interviewer CAPI VOXCO, p. 118	●				●	●	●			Both	●	●	●	Yes	
IT CATI/CAPI/Web Interview Technology, p. 108															
NET-CAPI Global Market Insite, Inc., p. 108	●		●	●	●	●	●			GUI	●	●	●	Yes	
NIPO CAPI System NIPO Software, p. 110	●					●	●	●		Both	●	●	●	Add-on	Lease \$\$\$\$
QPSMR INSIGHT QPSMR Limited, p. 112	●					●				Both				Yes	
Raosoft InterForm Raosoft, Inc., p. 113					●	●				GUI	●	●	●	Yes	Buy \$\$\$\$
Raosoft SurveyWin Raosoft, Inc., p. 113	●					●		●		GUI		●		Add-on	Buy \$
Reply® Fleetwood Group, Inc., p. 106	●	●				●				GUI	●	●	●	No	
Results for Research 6.0 RONIN Corporation, p. 113	●				●	●	●	●		Both	●	●	●	Yes	Buy
Raosoft EZSurvey for the Internet Raosoft, Inc., p. 113					●	●	●			GUI	●	●	●	Yes	Buy \$
SmartQuest TeleSage, Inc., p. 118	●								●	GUI	●			Add-on	Buy \$\$\$
SNAP® Professional Mercator Corporation, p. 109	●					●				GUI		●		Yes	Buy
SSI Web Sawtooth Software, Inc., p. 114	●				●	●				Both	●	●	●	Yes	Buy \$\$\$\$
SURVENT Computers for Marketing Corp. (CfMC), p. 104	●					●				Script				Yes	
SurveyPro Apian Software, p. 103	●					●				GUI		●		Yes	Buy \$\$
The Survey System Creative Research Systems, p. 104	●					●		●		GUI	●	●	●	Yes	Buy \$
The Survey System - CATI Creative Research Systems, p. 104	●					●				GUI	●	●		Yes	Buy \$
TouchPoll Survey Touchpoll Survey Solutions, p. 118	●						●	●							
TRIC TRAC® Software Innovation TricTrac A/S, p. 115	●				●	●		●		GUI		●		Yes	
WinQuery™ The Analytical Group, Inc., p. 102	●					●				Both	●	●	●	Yes	Buy \$\$\$

\$ = \$0-\$500

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\$\$\$\$ = \$2500+

CATI Software	Operating System				Design Tool Graphic user interface (GUI) or script	CATI Features			Purchasing	
	Win	Unix	Linux	Web		Central Management	Predictive Dialing	Tabulation Analysis Tools	Buy or Lease	Price Range
Software Title/ Company/Listing page#										
Askia Voice ASKIA, p. 103	●				Both	●	●	Yes		
Bellview CATI Pulse Train Ltd., p. 112	●				Both	●	●	Add-on	Either	
Blaise Westat, p. 119										
Confirmit FIRM INC., p. 106	●			●	GUI	●		Yes		
CONVERSO CATI CONVERSOFT (Axiom Software), p. 104										
Dub InterViewer NEBU b.v., p. 110			●	●	GUI	●	●	Yes	Lease	
Eform Beach Tech Corporation, p. 104	●			●	Both			Yes	Either	
InterACT Unified Dialog AB, p. 118	●				GUI	●		Yes	Either	
Interview & Analysis Program Comstat Research Corporation, p. 104										
Interviewer CATI VOXCO, p. 118	●			●	Both	●	●	Yes		
loxpHERE Xorbix Technologies, Inc., p. 119	●			●	GUI			Yes	Either	
IT CATI/CAPI/Web Interview Technology, p. 108										
NET-CATI Global Market Insight, Inc., p. 108	●	●	●	●	GUI	●	●	Yes		
NIPO CATI System NIPO Software, p. 110	●				Both	●	●	Add-on	Lease	\$\$\$\$
OSCAR™ DataUSA, Inc., p. 105	●	●	●			●	●	Yes	Lease	
QPSMR CATI QPSMR Limited, p. 112	●				Both	●	●	Yes	Lease	\$\$\$\$
Quancept CATI SPSS MR USA, p. 115		●			GUI	●	●	Add-on	Either	
Quancept Tel. Sys. Predictive Dialer SPSS MR USA, p. 115					Script	●	●	Add-on	Either	
Raosoft InterForm Raosoft, Inc., p. 113				●	GUI	●		Add-on	Buy	\$\$\$\$
Raosoft SurveyWin Raosoft, Inc., p. 113	●				GUI	●		Add-on	Buy	\$
Results for Research 6.0 RONIN Corporation, p. 113	●			●	Both	●	●	Yes	Buy	
Raosoft EZSurvey for the Internet Raosoft, Inc., p. 113				●	GUI	●		Add-on	Buy	\$
SNAP® Professional Mercator Corporation, p. 109	●				GUI			Yes	Buy	
StatPac for Windows StatPac, Inc., p. 115	●				Script			Yes	Buy	\$\$
SumQuest SumQuest Survey Software, p. 116	●				GUI				Buy	\$
SURVENT Computers for Marketing Corp. (CfMC), p. 104	●	●	●	●	Script	●	●	Yes		
SurveyPro Apian Software, p. 103	●				GUI			Yes	Buy	\$\$
Sysurvey.com SySurvey, p. 118				●	GUI			Yes	Lease	
TelAthena TelAthena Systems LLC, p. 118										
Telescript 5.4 Digisoft Computers, Inc., p. 106	●				GUI		●	Add-on	Either	\$\$
The Survey Cybernetic Solutions - The Survey Software, p. 105	●				GUI	●		Yes	Buy	\$
The Survey System - CATI Creative Research Systems, p. 104	●				GUI	●		Yes	Buy	\$
WinCati Sawtooth Technologies, Inc., p. 114	●				Both	●	●	No	Buy	\$\$\$\$
WinQuery™ The Analytical Group, Inc., p. 102	●				Both	●	●	Yes	Buy	\$\$\$

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Web Interviewing Software Solutions Software Title/ Company/Listing page#	Operating System					Design Tool Graphic user Interface (GUI) or script	Web Interviewing Features					Purchasing	
	Win	Mac	Unix	Linux	Web		Data Collection (Web or E-mail)	Quota Control	Web Security	Tabulation & Analysis Tools	Real-Time Reports	Buy or Lease	Price Range
ARCS™ IVR/Web DBM Associates, p. 105	●				●	GUI		●	●	No			
Askia Web ASKIA, p. 103	●					GUI		●	●	Yes			
Bellview Web Pulse Train Ltd., p. 112	●					Both	Web	●	●	Add-on		Either	
Blaise Westat, p. 119													
C-Gen - Customer Survey Generator William Steinberg Consultants, Inc., p. 116	●					GUI	Both			Yes		Buy	\$
Confirmit FIRM INC., p. 106					●	GUI	E-mail	●	●	Yes			
Dub InterViewer NEBU b.v., p. 110	●			●		GUI	Web	●	●	Add-on		Lease	
Eform Beach Tech Corporation, p. 104	●				●	Both		●	●	Yes			
eSurveyor 3.1 Domino Halogen Software Inc., p. 108													
eSurveyor 3.2 Open Halogen Software Inc., p. 108													
Hosted Survey Hostedware, p. 108					●	Both	Both	●	●	Add-on	●	Either	
IdeaMap®.Net Moskowitz Jacobs Inc., p. 110					●	GUI	Web	●	●	Yes		Lease	\$\$
Inet Q Online Research.Net, Inc., p. 113												Either	
Inquisite Web Survey Inquisite Web Surveys, p. 108	●				●	GUI	Web	●	●	Yes	●	Either	\$\$\$\$
InsightExpress InsightExpress, LLC, p. 108					●	Both	Both	●	●	Yes	●	Lease	
InsightPanels InsightExpress, LLC, p. 108					●	Both	Both	●	●	Yes	●	Buy	
InstantSurvey NetReflector.com, Inc., p. 110					●	Both	Both	●	●	Yes	●	Lease	\$\$
InterACT Unified Dialog AB, p. 118	●					GUI		●		Yes		Either	
Internet Survey Machine Marketing Masters, p. 108													
Interview & Analysis Program Comstat Research Corporation, p. 104													
Interview Reporter SPSS MR USA, p. 115	●									Yes	●	Either	
Interviewer Web VOXCO, p. 118	●					Both		●	●	Yes			
loxphere Xorbix Technologies, Inc., p. 119	●	●			●	GUI	Both	●	●	Yes		Either	
iQuest TeleSage, Inc., p. 118	●					GUI	Both	●	●	Add-on	●	Buy	\$\$\$\$
IT CATI/CAPI/Web Interview Technology, p. 108													
MR Data Manager SPSS MR USA, p. 115	●					Both				Add-on		Either	
MR Interview SPSS MR USA, p. 115	●					Both		●	●	Yes		Either	
NET-Survey Global Market Insite, Inc., p. 108	●		●	●	●	GUI		●	●	Yes			
NIPO Web Interview System NIPO Software, p. 110	●					Both	Both	●	●	Yes		Lease	\$\$
OSCAR™ DataUSA, Inc., p. 105	●		●	●			Both	●	●	Yes	●	Lease	

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Web Software Software Title/ Company/Listing page#	Operating System					Design Tool Graphic user interface (GUI) or script	Web Interviewing Features					Purchasing	
	Win	Mac	Unix	Linux	Web		Data Collection (Web or E-mail)	Quota Control	Web Security	Tabulation & Analysis Tools	Real-Time Reports	Buy or Lease	Price Range
Pop-Up Survey Software SurveySite Inc., p. 116													
PowerTab™ Power Knowledge Software, p. 112		●				GUI	Web	●		Yes		Buy	\$
QueryWeb™ The Analytical Group, Inc., p. 102	●					Both	Web	●	●	Yes	●	Buy	\$\$\$\$
Quiz Rocket LearningWare, Inc., p. 108													
Raosoft InterForm Raosoft, Inc., p. 113					●	GUI		●		Add-on		Buy	\$\$\$\$
Remark Web Survey® Principia Products, p. 112	●					Both	Both	●		Yes		Buy	\$
Results for Research 6.0 RONIN Corporation, p. 113					●	Both	Web	●	●	Yes	●	Buy	
Raosoft EZSurvey for the Internet Raosoft, Inc., p. 113					●	GUI	Both	●		Add-on		Buy	\$
Rogator 6.3 Rogator AG, p. 113	●				●	GUI		●	●	Yes			
SatisfactionExpress InsightExpress, LLC, p. 108					●	Both	Both	●	●	Yes	●	Lease	\$\$\$\$
Sensus Web Sawtooth Technologies, Inc., p. 114	●					Both	Web	●	●	Yes		Buy	\$\$\$\$
Smart Revenue System SmartRevenue.com, p. 114					●								
SNAP® Professional Mercator Corporation, p. 109	●					GUI	Both			Yes		Buy	
SSI Web Sawtooth Software, Inc., p. 114	●					GUI	Both	●	●	Yes		Buy	\$\$\$\$
StatPac for Windows StatPac, Inc., p. 115	●					Script	Both	●		Yes		Buy	\$\$
SumQuest SumQuest Survey Software, p. 116	●					GUI	Both			Yes		Buy	\$
The Survey Cybernetic Solutions - The Survey Software, p. 105	●					GUI	Both	●		Yes		Buy	\$
Survey Genie William Steinberg Consultants, Inc., p. 116	●					GUI	Both			Yes		Buy	\$
Survey Said for the Web Marketing Masters, p. 108	●					GUI	Both			Yes		Buy	\$\$
Survey Said for Windows Marketing Masters, p. 108	●					GUI	Both			Yes		Buy	
Survey Select Expert SurveyConnect, Inc., p. 116	●					GUI	Both	●		Yes		Buy	\$\$
surveyNgin.com Database Sciences, Inc., p. 105					●					Yes			
SurveyPro Apian Software, p. 103	●					GUI	Both	●		Yes		Buy	\$\$
SurveySolutions Perseus Development Corporation, p. 112	●					GUI	Both	●	●	Yes			
The Survey System - Web Creative Research Systems, p. 104	●					GUI	Both	●	●	Yes		Buy	\$\$
SurveyWriter® SurveyWriterÆ, p. 116													
Sysurvey.com SySurvey, p. 118					●	GUI	Both	●	●	Yes	●	Lease	
TRIC TRAC® Software Innovation TricTrac A/S, p. 115	●					GUI	Both	●	●	Yes			
WebSURVENT Computers for Marketing Corp. (CfMC), p. 104	●		●	●	●	Script		●	●	Add-on			
WebSurveyor WebSurveyor Corporation, p. 118	●					GUI		●		Yes		Buy	\$\$

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Paper-Based/Scan Survey Software Software Title/ Company/Listing page#	Operating System		Design Tool Graphic user interface (GUI) or script	Scan Types					Features & Tabulation & Analysis Tools	Purchasing	
	Win	Web		OCR	OMR	Bar Code	Pre Printed	Hand Written		Buy or Lease	Price Range
Bellview Scan Pulse Train Ltd., p. 112	•		GUI	•	•	•	•	•	Add-on	Either	
C-Gen - Customer Survey Generator William Steinberg Consultants, Inc., p. 116	•		GUI						Yes	Buy	\$
Confirmit FIRM INC., p. 106		•	GUI						Yes		
Eform Beach Tech Corporation, p. 104	•	•	Both		•	•			Yes	Either	
ExpertScan AutoData Systems, p. 104	•		GUI	•	•	•	•	•	Yes	Buy	\$\$\$
Eyes & Hands ReadSoft, Inc., p. 113											
FAQSS Optimum Solutions Corp., p. 110	•		GUI	•	•	•	•	•	Yes	Lease	\$\$\$\$
Inquisite Web Survey Inquisite Web Surveys, p. 108	•	•	GUI		•				Yes	Either	
InterACT Unified Dialog AB, p. 118	•		GUI		•	•		•	Yes	Either	
MPA Data Entry Data Vision Research, Inc., p. 105	•		GUI						Add-on	Buy	\$
MR Paper SPSS MR USA, p. 115	•		GUI							Buy	
MR Scan/MR Paper SPSS MR USA, p. 115	•		GUI	•	•	•	•	•	Add-on	Either	
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Remark Classic OMR™ Principia Products, p. 112	•		GUI		•	•	•		Yes	Buy	\$\$
Remark Office OMR® Principia Products, p. 112	•		GUI		•	•			Yes	Buy	\$\$
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Survey Plus 2000 AutoData Systems, p. 104	•		GUI	•	•	•		•	Yes	Buy	\$\$
Survey Said for Windows Marketing Masters, p. 108	•		GUI	•	•				Yes	Buy	
Survey Select Expert SurveyConnect, Inc., p. 116	•		GUI						Yes	Buy	\$\$
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The Survey System Creative Research Systems, p. 104			GUI		•				Yes	Buy	\$

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Miscellaneous Software	Audience Response	Data Cleaning/Sorting	Data Conversion	Data Delivery/Archiving	Data Mining/Perceptual Map	Decision Support	Demographic	Field Management	Focus Group Management	Name/tag-line Development	Online Focus Group	Online Research Security	Phone Number Screening	Predictive Dialing	Sampling Systems	Translation	Web Usability
Software Title/ Company/Listing page#																	
2D VOG SensoMotoric Instruments, p. 114	●																
3D VOG SensoMotoric Instruments, p. 114	●																
AdverTrax™ Synovate, p. 116					●	●											
ARGUS Perceptual Mapper Spring Systems, p. 115						●											
Arthur The Analytical Group, Inc., p. 102			●														
ASDE Survey Sampler - Canada ASDE Survey Sampler, p. 103															●		
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Compass Claritas Inc., p. 104						●	●										
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Data Utilities Data Vision Research, Inc., p. 105		●															
DataFit 7.1 Oakdale Engineering, p. 110					●												
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Miscellaneous Software Software Title/ Company/Listing page#	Audience Response	Data Cleaning/Sorting	Data Conversion	Data Delivery/Archiving	Data Mining/Perceptual Map	Decision Support	Demographic	Field Management	Focus Group Management	Name/Tag-line Development	Online Focus Group	Online Research Security	Phone Number Screening	Predictive Dialing	Sampling Systems	Translation	Web Usability
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Miscellaneous Software	Audience Response	Data Cleaning/Sorting	Data Conversion	Data Delivery/Archiving	Data Mining/Perceptual Map	Decision Support	Demographic	Field Management	Focus Group Management	Name/tag-line Development	Online Focus Group	Online Research Security	Phone Number Screening	Predictive Dialing	Sampling Systems	Translation	Web Usability
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Miscellaneous Software	Audience Response	Data Cleaning/Sorting	Data Conversion	Data Delivery/Archiving	Data Mining/Perceptual Map	Decision Support	Demographic	Field Management	Focus Group Management	Name/tag-line Development	Online Focus Group	Online Research Security	Phone Number Screening	Predictive Dialing	Sampling Systems	Translation	Web Usability
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Trade Talk

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distributed the product until you put it in front of the shopper. Merely having it in the same building as they're in is not distribution."

The second is a process Sorensen calls double conversion. Once you have a consumer in front of your product, you have to get them to stop and consider it, and then they have to put it in their cart. That's where packaging and point-of-purchase materials play such a vital role.

The third is buy speed, i.e., how long it takes for the process to occur. "A very high percentage of shopping in the center store aisles is excursion shopping, where people come down an aisle and turn around and go back out," he says. "Many people go around the racetrack with a jog in here and there to pick up something. What this means is, you see a heck of a lot more traffic at the end of an aisle than at the middle. So if you want high exposure, you need to be near the end of the aisle."

But there are also offsetting considerations about speed. The research shows that people shop faster at the end of the aisle. So if the product is something that requires a bit of examination by consumers, a manufacturer may be better off with a placement further down the aisle.

"For example, it takes people a long time to buy squeeze mayonnaise. So, as the manufacturer, if you are selling this product, how can you expedite people's decision to buy? I guarantee you that that long consideration time is deterring sales, because people aren't really sure they want it. They are picking it up, looking at it, turning it over, wondering if it would work, etc. That long buy speed is not favorable. We can provide a manufacturer with a list of the buy speeds for every item in their category and they can see if they have products that take a long time to buy, particularly relative to competitive items, which could help them make decisions on where their products should be placed."

A helpful addition to all of this information would be some good old-fashioned observational research, fol-

lowed by interviews to find out, for example, why it took that person so long to pick that product.

For the most part, if I want an item, I don't care where it's located, on an end cap, in the middle of the aisle, or on a bottom shelf. But it makes sense to have a product whose purchase requires a bit of rumination located near the middle of an aisle — if only because there's usually more room for fellow shoppers to maneuver around you as you stand wondering if that new dinner-in-a-box is really so easy to prepare. On the other hand, if you're causing a log jam in the packaged dinners aisle, you may just toss the box in your cart and tell your overanalytical side to shut up (don't do that kind of thing out loud; it draws fearful looks).

Location, location, location

For all this talk about where the product is located, Sorensen says that the *shopper's* location is the dominant factor controlling in-store behavior. People spend more time at the beginning of their trip shopping and buying than they do at the end. The closer they get to the exit, the faster they go. "If you look at certain areas, such as the center store aisles, 85 percent of shoppers' behavior is driven by their location in the store and 15 percent by the product they are seeking," he says. "For example, people don't tend to buy salad dressing in a uniform amount of time. If they encounter salad dressing at the beginning of their trip, it takes them three times as long as it would if they sought salad dressing at the end of their shopping trip."

Blame that end-of-trip rushing on what Sorensen calls the Checkout Magnet. "That has huge implications and raises a number of questions," he says. "Why are they shopping faster? Are they getting tired? Do they want to get out of there? Are they more sure of what they are buying later on?"

If they're like me, they've probably glanced at their watch and realized that their worried spouse back home is minutes away from sending out a search party for them. **TM**

Product & Service Update **New version of usability testing software**

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available for the past four censuses (1970-2000). The Census Research Package includes all of the firm's products in one bundle. It has all of the CensusCD 2000 products, the Long Form for from 1970, 1980, and 1990 and additionally has GeoLytics' time series analysis products (Neighborhood Change Database; CensusCD 1990 in 2000 Boundaries). For more information visit www.geoalytics.com.

St. Paul-based software firm Neenan Partners has introduced Version 3.0 of its TwinView Studio portable usability testing software. New features include: a redesigned interface; the ability to change event marker button categories on the fly; and a new carrying case. All of the hardware, except for the computer, is now contained in one small case. As a result, by loading TwinView Studio software on a laptop, users can fit the

entire product in a computer carrying case. TwinView Studio provides digital video recording and data that includes: synchronized, face and screen captures; highlights of mouse and click activities; real-time marking and annotating of key points; sort and filter of clips for creating highlight videos; digital recording backup to CD-R; structured data fields; data management in text or graphics mode; and highlighted data exported to Excel. For more information visit www.straticom.com.



Trade Talk

By Joseph Rydholm, Quirk's editor

Stranded in the soup aisle

I can't do it. Try as I might, I just can't make it in and out of the grocery store in less than 90 minutes. People talk about losing track of time in the casinos in Vegas. Phooey. I grab hold of that grocery cart and next thing I know, the sun is coming up.

My dear wife tried shopping with me a few times and then couldn't stand it anymore. To be honest, I'm not sure what the problem is. I always have a list with me and I don't do a lot of impulse buying, so it's not like I'm wasting time getting non-essential items. I am a big nutrition label reader though, so maybe that's my downfall. Plus I enjoy examining new products that I notice on the shelves.

Being a time-impaired shopper, my interest was piqued when I read about the work that Sorensen Associates is doing. The Portland, Ore., research firm has been mapping individual grocery shopping trips using PathTracker, a system that incorporates pager-sized transmitters on shopping carts that emit signals every four seconds which are tracked by an array of antennae in a store. By overlaying these readings on a detailed planogram of the store, the company can show where each shopper went, the routes they took to get there, where they stopped, how long they stopped, etc.

The system was tested at a Thriftway store in suburban Portland over a five-month period. The company's president, Herb Sorensen, has presented the results from this and other tests at recent industry conferences.

The conventional wisdom is that people walk up and down each aisle in the grocery store, and many people think they shop that way but they really don't, Sorensen says. Some shoppers follow what Sorensen calls the racetrack, tracing a broad circle around the store by visiting areas along its periphery, with occasional forays into the center aisles for specific items. Some folks wander, tracing paths back and forth over large portions of the store and moving up and down most of the aisles (hmm...that sounds familiar). Others show an admirable amount of discipline, making a beeline for their destination, getting the products they need and heading toward the checkout, with few if any side trips on the way.

Only a small percentage of shoppers traverse the entire store. Most visit only half or less of it. The average shopping trip lasts 17 minutes and covers 1,569 feet. In that time, 28 percent of the store is covered, with 32 stops/pauses to purchase 5.8 items at a cost of \$14.97.

In terms of the dollar volume of purchases, the peak sales occur at about the 70 percent point in the trip. Purchasing does not occur evenly across the trip.

Three factors

When talking to manufacturers, Sorensen cites three crucial factors that affect the shopping process. The first is effective distribution. "Simply getting products into the store doesn't cut it," he says. "You have not effectively

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Which variety of ketchup will cut the mustard?

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